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Secretary

**Amendment #1
REQUEST FOR PROPOSALS (RFP)
CONSULTING AND TECHNICAL SERVICES
PROJECT NO. 050R5800338
September 1, 2005**

Ladies/Gentlemen:

This Amendment #1 is being issued to amend and clarify certain information contained in the above referenced RFP. All information contained herein is binding on all offerors who respond to this RFP. Specific parts of the RFP have been amended. The following changes/additions are listed below; new language has been double underlined and marked in bold (i.e., **word**) and language deleted has been marked with a strikethrough (i.e., ~~word~~).

1. Revise, 1.4 Master Contracts Type:

The Master Contract shall be an Indefinite Quantity Contract as defined in COMAR 21.06.03.05 and 06. Fixed Price (FP) and Time and Material (TM) TOAs as described in each respective TORFP will be issued under the Master Contract, as appropriate to the type of services being requested. In addition, business beneficial, ~~and~~ revenue neutral, **or commission only** concepts may be applied to TOs under the Contracts.

A commission only is a type of payment for performing a TOA whereby the exclusive payment to the Contractor will be a percentage of monies actually received by the State as a result of the Contractor's audit findings. Note: An Offeror's commission bid rate may not exceed 35% of recoveries or increased revenues. This percentage will not be paid for any amount of future cost avoidance or increased revenue that results from a Contractor's finding under any audit TOA.

2. Revise, Section 1.30 Non-Visual Access:

The Non-visual Access Clause noted in COMAR 21.05.08.05 and referenced in this solicitation is the basis for the standards that have been incorporated into the Maryland regulations, which can be found at: www.dbm.maryland.gov - keyword: ~~non-visual access~~ **nva**.

3. Revise, Section 2.2.2 Required Project Policies, Guidelines and Methodologies:

C) ~~The State of Maryland Enterprise Architecture~~ **Information Technology Project Oversight** at: www.dbm.maryland.gov - keyword: IT Project Oversight;

4. Add, Section 2.2.6 Disclosure of Intellectual Property Claims:

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Contractor shall disclose as part of its TOP any and all proprietary claims it may have with regard to any previously owned or preexisting intellectual property. Failure by Contractor to clearly and unequivocally disclose the nature and extent of its claim, right, or interest in its TOP prior to award shall constitute a waiver by Contractor of such claim, right, or interest.

5. Revise, Section 3.4.3.3 Offeror General Information:
 1. The Offeror's Corporation/organization size, experience, services provided **and** the length of time the organization has been providing the services listed, ~~and key business relationships.~~
 2. Information on annual income for at least one full year, **offeror shall define as calendar or fiscal year.**
6. Revise, Section 3.4.3.3 ~~4~~ Past Performance
7. Revise, Section 3.4.3.4 ~~5~~ Required Submissions
8. Revise, page 104 Attachment D-1-Master:

CERTIFIED MBE UTILIZATION AFFIDAVIT
ATTACHMENT D-1-Master
CATS Master Contractor Acknowledgement of Task Order MBE Requirements

9. Revise, Section 2.3.9 – Functional Area Nine – IT and Telecommunications Financial and Auditing Consulting Services
 - 2.3.9.1 Cost and Financial Analyses
 - A) Description – An independent “third-party” review of cost factors associated with the recommended solutions contained in proposals from contractors to develop information technology and telecommunications solutions. Independent third-party reviews may include such analyses as project return on investment, total cost of ownership, ~~and~~ IT project portfolio analysis **and payments made or revenues received by State agencies under various contracts for telecommunications activities.**
 - B) Examples of Potential Task Orders:
 - **Verify charges and credits on telecommunications invoices that the State has received for various telecommunications equipment, systems and services, or amounts received under revenue producing contracts (may include inventory of equipment, lines, circuits and other telecommunications facilities). Assist in obtaining cash refunds from vendors for any erroneous charges, credits, or revenue shortages identified through audits.**

10. Revise, Section 2.11 Personnel Qualifications:

96. Systems Engineer

Duties: Must be capable of analyzing information requirements. Evaluates system problems of workflow, organization, and planning. Develops appropriate corrective action.

Education: A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline or three years of equivalent experience in a related field. A Master's Degree in one of the above disciplines equals one year specialized and two years general experience. An additional year of specialized experience may be substituted for the required education.

General Experience: Must have three years of experience in systems engineering.

Specialized Experience: At least one year of experience in analytical problem solving of workflow, organization and planning.

110. Photographer

Duties: Responsible for photographing erected radio towers and providing photographic simulation through superimposition of an image of the towers at different locations.

Education: Associates Degree from an accredited college or university in Photography or related field or two (2) years of equivalent experience in a related field. A Bachelor's Degree is preferred.

General Experience: At least one (1) year of experience providing photographic simulation and photographing radio towers or other tower structures.

111. Audit Manager

Duties: Performs day-to-day management of overall contract support operations, possibly involving multiple audits and groups of personnel at multiple locations. Responsible for the overall direction and guidance of all ongoing audits for the State; responsible for audit report(s) and all findings contained therein; in coordination with the State's designated representative, assists with the collection of any amounts due to the State as a result of audits. Organizes, directs, and coordinates the planning and production of all contract support activities, including subcontractors. Develops work breakdown structures and prepares charts, tables, graphs, major milestone calendars and diagrams to assist in analyzing problems and making recommendations.

Experience: At least four (4) years of supervision of other auditors engaged in the telecommunications billing audit process.

112. Audit Supervisor

Duties: Performs day-to-day management of assigned projects that involve teams of Lead Auditors and Staff Auditors. Primarily responsible for developing and overseeing the execution of the audit plan; regularly communicates with and reviews the work of on-site Lead and Staff Auditors and gives directions as appropriate; attends meetings with State representatives and is otherwise available to the State's representatives, as required. Organizes, directs, and coordinates the planning and production of all activities associated with assigned projects. Prepares and presents program level management products such as, work breakdown structures, charts, tables, graphs, major milestone calendars and diagrams to assist in analyzing problems and making recommendations.

Experience: At least two (2) years of supervision of other auditors engaged in the telecommunications billing audit process.

113. Lead Auditor

Duties: Assists in developing the telecommunications billing audit plan; primarily responsible for the routine performance of the audit plan and in providing direction of assigned Staff Auditors; communicates on a regular basis with the State's designated representative on status and audit issues.

Experience: At least two (2) years of telecommunications billing audit experience.

114. Staff Auditor

Duties: Assists in the performance of telecommunications billing audits under the guidance and direction of a lead auditor and/or audit supervisor.

Experience: At least one (1) year of telecommunications billing audit experience.

11. Add to Attachment A – Contract:

7.4 The RFP and the Master Contract form the basis of any license the State has in connection with any and all intellectual property provided by Contractor. The State will not accept any additional agreements with Contractor, including but not limited to license agreements.

12. Revise, Attachment F – Pricing Instruction Form:

A) On the Labor rates F-1 spreadsheet, record the hourly labor rate for all 5 years for all labor categories that are being proposed. Offerors proposing to multiple functional areas are not required to submit a separate F-1 for each functional area proposed. Only one (1) F-1 is required.

B) On the ASP Costs F-2 spreadsheet, record the monthly flat rate for software or applications owned and hosted by the ASP. On the ASP Cost F-3 spreadsheet, record the monthly flat rate for software or applications owned by the State and hosted by the ASP. Monthly prices shall be recorded for a single user (1), multiple user (2-50), and unlimited users (51+).

C) ~~AC)~~ On the Telecom Audit F-4 spreadsheet, record the Commission Only percentage. This percentage will be applied to only the money actually received by the State as a result of the Contractor's audit findings. An Offeror's commission rate may not exceed 35% of recoveries or increased revenues. This percentage will not be paid for any amount of future cost avoidance or increased revenue that results from a Contractor's findings under any TOA.

D) All ~~Unit/Extended Prices~~ Offeror Prices must be clearly typed ~~or written in ink~~ with dollars and cents, e.g., \$24.15. and all percentages must be typed ~~or written in ink~~ with no more than one decimal place, e.g., 15.5 %.

~~B)~~E) All Unit Prices Offeror Prices must be the maximum unit price the State shall pay for the proposed item per this RFP and may not be contingent on any other factor or condition in any manner.

B) All calculations that result in a fraction of a cent must be rounded to the nearest four (4) places after the decimal point, i.e., .02532 would be rounded to .0253 and .02456 would be rounded to .0246.

- ~~D) All goods or services required or requested by the State and proposed by the vendor at No Cost to the State must be clearly entered in the Unit Price and Extended Price Offeror Price with \$0.00.~~
- ~~E) All goods or services required or requested by the State and Not Offered by the vendor to the State must be clearly typed in the Unit Price and Extended Price Offeror Price with N/O.~~
- ~~F) F Except as instructed on the forms, nothing shall be entered on the forms that alters or proposes conditions or contingencies on the prices. or percentages.~~
- ~~G) The Offeror must record the specifications of equipment and/or services requested.~~
- H) G It is imperative that the prices included on the Price Proposal Forms have been entered correctly and calculated accurately by the vendor and that the respective total prices agree with the entries on the Price Proposal Forms. Any incorrect entries or inaccurate calculations by the vendor will be treated as provided in COMAR 21.05.03E and 21.05.02.12.

Price Proposal Forms

Under Construction.

13. Revise, Attachment F – Pricing Spreadsheet Labor Rate Schedule F-1:

96	<u>Systems Engineer</u>
110	<u>Photographer</u>
111	<u>Audit Manager</u>
112	<u>Audit Supervisor</u>
113	<u>Lead Auditor</u>
114	<u>Staff Auditor</u>

14. Revise, Attachment F - Pricing Spreadsheet ASP Schedules F-2 and F-3:

Defined Multiple Users and Unlimited Users see column headings for columns E, F, I, J, M, N, Q, R, T and U.

~~** Record the Contractor monthly rates for each category for each base contract year.~~

~~*** Record the number of users this price is for in an appropriate footnote.~~

15. Added, Attachment F – Pricing Spreadsheet Telecommunications Audits F-4

Reference updated pricing sheet.

Date Issued: September 1, 2005

By _____
Susan S. Woomeer
Procurement Officer