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Q&A #1
CATS+ TORFP
PROJECT NO. D38B4400009
December 20, 2013

Ladies/Gentlemen:

This list of Questions and Answers #1, questions #1 through #25, is being issued to clarify certain information contained in the above named TORFP. The statements and interpretations of contract requirements, which are stated in the following questions of potential Offerors, are not binding on the State, unless the State expressly amends the TORFP. Nothing in the State's responses to these questions is to be construed as agreement to or acceptance by the State of any statement or interpretation on the part of the vendor asking the question as to what the contract does or does not require.

1. **Question:** On page 32, item 3.4.1 asks for a Proposed Solution and Draft Risk Assessment that is specific to section 2.6.3 as the scope of work. Since this is a staff augmentation RFP, how can we adequately respond to the requirements that seem to be project-based?

Answer: Your proposed solution should address your firm's process for responding to work orders, such as the SBE's primary contact, your process for selecting and screening of proposed candidates, your management of the MBE requirement and other relevant information on how you intend to service this account.

The Draft Risk Assessment should be your assessment of the risks inherent

2. **Question:** What is the target start date for this engagement? Key Information Summary Sheet says 3/1/14. Table 2.1 Project Resources says February.

Answer: The goal of SBE is to commence the engagement as soon as the evaluation process is complete and an award is made, preferably no later than March 1, 2014. Please refer to Section 2.1, paragraph 4. One each of Resource #3, # 4 and # 5 are expected to start at Notice to Proceed, which is why these dates are listed as "Estimated Start" dates. If Notice to Proceed is issued in February, these resources will start at that time.

3. **Question:** Would SBE consider extending the due date for this response beyond 1/6/14? This is a lot of information requested to be delivered in a very short period of time with the holidays coming up.

Q&A #1
CATS+ TORFP
PROJECT NO. D38B4400009
December 20, 2013

Answer: Yes, the new TORFP Proposal Closing Due Date will be January 15, 2014 at 2:00 PM local time.

4. **Question:** Is this a new requirement, or a re-bid of an existing contract?

Answer: This is a new contract.

5. **Question:** After award, how much time will be allowed from the time Work Orders are issued until additional positions are expected to be filled?

Answer: The time frame will be defined in each work order and will be in accordance with all CATS+ contract standards.

6. **Question:** Page 29, Section 2.9.1 Offeror's Company Minimum Qualifications, is SBE looking for two different references with one for 15 different resources, and another for 12 full-time project resources simultaneously on a \$10M or greater IT project?

Answer: No. A single reference for one project is expected.

7. **Question:** In Table 2.1 Project Resources, on page 14, the "Training Coordinator" Resource Type mapped to the CATS+ Labor Category of "Training Specialist/Coordinator," however there is not a "Training Specialist/Coordinator" Labor Category in CATS+. Please advise as to the CATS+ Labor Category to use for the "Training Coordinator."

Answer: Category of "Training Specialist/Instructor."

8. **Question:** 2.6.3.17(d) on page 16 states, "A timesheet displaying ... Original signature of the individual and signature date, Contractor supervisor signature and date." Our timekeeping system is electronic. Are electronic copies from the timecard system showing when both the employees and supervisors electronically signed the timecards acceptable?

Answer: No. The SBE utilizes a standard Contractor Timesheet for this project and all contractor personnel will be required to complete and submit the SBE timesheet.

9. **Question:** Section 2.6.5 on pages 18-21: For all three contractor personnel resources at NTP, several Preferred Requirements starts off with "Must have ..." Are the requirements Preferred or Must Have?

Answer: The requirements are "Preferred." "Must have" was used inappropriately.

Q&A #1
CATS+ TORFP
PROJECT NO. D38B4400009
December 20, 2013

10. **Question:** 2.6.8(A) on page 21: Does the Maryland SBE have sufficient space for all of the TO Support Personnel required?

Answer: Not at this time.

11. **Question:** 2.6.8(B) on page 22: Does the contractor have to supply the equipment noted for all contractor personnel or only for personnel who are located on the contractor site.

Answer: The Contractor is required to provide the stated equipment for the contractor personnel located at the contractor site. SBE does, however, expect that Contractor personnel located at the SBE office provide their own laptop computer.

12. **Question:** 9.1.1(a) on page 32 states, "The project shall have lasted at least three (3) years." We have a qualifying project that has lasted over three years, but it has spanned multiple contract awards. Does this meet the criteria for evidence?

Answer: Yes.

13. **Question:** Attachment 1 Price Proposal Form on pages 40-41: Why are 2,000 hours used for Total Class Hours instead of a more likely work year of 1,840, 1,880, or 1,920 hours?

Answer: The 2000 hours figure is for evaluation purposes only.

14. **Question:** For evaluation purposes, will your price evaluation be on three immediate labor categories or all of Attachment 1?

Answer: The price evaluation will be based upon all labor categories in Attachment 1.

15. **Question:** Does limited space at the government site mean that resources will be required to be at the Contractor site?

Answer: SBE is limited on space and would like to know if the Offereors are capable of providing space for the Contract resources as an option. This is not a requirement, but a way of SBE understanding its options.

16. **Question:** Is a contractor at a disadvantage by not proposing space for Contractor resources at the Contractor site?

Answer: No.

17. **Question:** In 1.12 the title mentions MBE sub goals, are there any MBE sub goals?

Q&A #1
CATS+ TORFP
PROJECT NO. D38B4400009
December 20, 2013

Answer: No.

18. **Question:** Regarding Section 2.9.1 – Offerors Minimum Qualifications, please clarify the Master Contractor minimum qualifications.

Answer: The Offeror must demonstrate that they have provided personnel resources from a minimum of 15 different resource labor categories over the course of one major IT project. This is a big project and SBE is looking for proven experience on large projects. To clarify, this is for 15 different labor categories.

19. **Question:** Regarding Section 2.9.1, would SBE consider allowing a smaller company and larger prime [Contractor] to combine their experience to meet the requirements [of Section 2.9.1]?

Answer: The Offeror must demonstrate the minimum qualifications.

20. **Question:** Can an Offeror that was a subcontractor on a [previous] project that supplied the 12 simultaneous resources and 15 labor categories overall to qualify, or do they need to have been the Prime Contractor on the [previous] project?

Answer: The Offeror could have been a subcontractor so long as they provided the required number of resources and resources from the required number of labor categories.

21. **Question:** Is there a time period in which the Offeror met the requirements for Section 2.9.1?

Answer: No.

22. **Question:** When do you expect to have responses to today's questions and will you be providing an amendment to the TORFP?

Answer: SBE will release the questions and responses from the pre-proposal conference within the next few days. SBE will also submit an amendment document to the TORFP.

23. **Question:** Can a small company that does not meet the minimum qualifications be the Prime Contractor if they have a sub that does meet the minimum qualifications?

Answer: No.

24. **Question:** Will the attendance sheet be provided to the attendees?

Q&A #1
CATS+ TORFP
PROJECT NO. D38B4400009
December 20, 2013

Answer: Yes, the sign in list will be provided.

25. **Question:** Regarding Section 1.5 Oral presentations, will the Master Contractor and the three candidates need to show up for the oral presentation?

Answer: Yes. Down-selection with the three candidates will occur via phone screenings. Oral presentations for the final selection will be with the Master Contractor and the three candidates in person at the SBE office.

Keith E. Ross
Task Order Manager

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Q&A #2
CATS+ TORFP
PROJECT NO. D38B4400009
December 27, 2013

Ladies/Gentlemen:

This list of Questions and Answers #2, questions #26 through #29 is being issued to respond to questions that were received regarding the aforementioned TORFP that were submitted after the release of Questions and Answers#2. The statements and interpretations of contract requirements, which are stated in the following questions from potential Offerors, are not binding on the State, unless the State expressly amends the TORFP. Nothing in the State's responses to these questions is to be construed as agreement to or acceptance by the State of any statement or interpretation on the part of the vendor asking the question as to what the contract does or does not require.

26. **Question:** Section 3.4.1 G states:

G) Master Contractor and Subcontractor Experience and Capabilities

1. Provide up to three examples of engagements or contracts the Master Contractor has completed that were similar to Section 2 – Scope of Work. Include Contract Information for each client organization complete with the following:

Since the Heading states that this requirement covers both Masters and Subcontractors, should we assume that this is the case, i.e. that the examples should come from both, even though the text refers only to the Master?

Answer: No. Do not assume this. Experience and Capability Requirement #1 specifically asks for this information relative to the Master Contractor.

27. **Question:** On page 29, Section 2.6.8 discusses the TO Contractor's option to propose workspace outside of SBE. IF this space meets all other stated requirements, would SBE consider extending the distance to within 120 miles of the SBE main Office?

Answer: No. As stated the workspace should be located within 5 miles of the SBE Main Office.

28. **Question:** For the table listed in Section 3.4.1 B), what constitutes as evidence of compliance? Would a contract number and dates for one of our reference accounts suffice?

Q&A #2
CATS+ TORFP
PROJECT NO. D38B4400009
December 27, 2013

Answer: SBE expects the name of the agency for the IT project, the name of the project and a contract number under which the resources were supplied. Additionally we expect a list of the resource types supplied for each requirement.

29. Question: The TORFP outlines the Offeror's Company Minimum Requirements in Sections 2.9.1 and 3.4.1.B. It also requests examples of Master Contractor and Subcontractor Experience in Section 3.4.1.G. Can these qualifications and examples be fulfilled by the Offeror's team, that is, by the Master Contractor and/or all subcontractors, or must they be fulfilled only by the Master Contractor?

Answer: See answer provided in Q & A #1, Question # 19.

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Q&A #3
CATS+ TORFP
PROJECT NO. D38B4400009
January 3, 2014

Ladies/Gentlemen:

This list of Questions and Answers #3, questions #30 through #33, is being issued to respond to questions that were received regarding the aforementioned TORFP that were submitted after the release of Q&A #2. The statements and interpretations of contract requirements, which are stated in the following questions from potential Offerors, are not binding on the State, unless the State expressly amends the TORFP. Nothing in the State's responses to these questions is to be construed as agreement to or acceptance by the State of any statement or interpretation on the part of the vendor asking the question as to what the contract does or does not require.

30. Question: In Revised Section 2.9.1 OFFEROR'S COMPANY MINIMUM QUALIFICATIONS, on page 26 as follows:

"Only those Master Contractors that fully meet all minimum qualification criteria shall be eligible for TORFP proposal evaluation. The Master Contractor's proposal and references will be used to verify minimum qualifications. The Master Contractor's proposal shall demonstrate meeting the following minimum requirements:

- 1) The Offeror shall have provided personnel resources from a minimum of 15 different ~~resources~~ resource types over the course of at least one (1) major IT project. In addition:
 - a) The project shall have lasted at least three (3) years;
 - b) The Offeror shall have ~~previously~~ provided at least twelve (12) full-time project resources simultaneously in support of the major IT project. The major IT project shall have been valued at \$10M or greater."

On the long-term (over three years), ongoing project we would like to use, we have billed 19 people total, and we are currently billing 13 people. We are a subcontractor on the task and while we bid multiple labor categories, per instruction of the prime contractor, we had to fit our people into 7 labor categories for billing. When mapped to the proper disciplines, this is 19 unique labor categories. Since this can be confusing, I have attached our latest spreadsheet that shows the mapping. Does this project meet the minimum qualifications?

Q&A #3
CATS+ TORFP
PROJECT NO. D38B4400009
January 3, 2014

Answer: Offeror's response to this TORFP should map the resources from the project they choose to reference as close as possible to the Labor Categories in the CATS + Master Contract.

31. **Question:** Will the awarded Master Contractor of the Senior PM and Functional PM positions be allowed to bid on this TORFP?

Answer: No, the awarded Master Contractor of the current Senior PM and Functional PM will not be allowed to bid on this TORFP.

32. **Question:** Since the Senior PM and Functional PM positions have already been awarded, do we still have to provide costing information for both positions on the Price Proposal Form?

Answer: Yes

33. **Question:** Will the SBE consider candidates whose degrees were awarded from Universities in India, China or other countries?

Answer: Yes

Whitney Faust
Procurement Officer

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Q&A #4
CATS+ TORFP
PROJECT NO. D38B4400009
January 9, 2014

Ladies/Gentlemen:

This list of Questions and Answers #4, questions #34 through #49, is being issued to respond to questions that were received regarding the aforementioned TORFP that were submitted after the release of Q&A #3. The statements and interpretations of contract requirements, which are stated in the following questions from potential Offerors, are not binding on the State, unless the State expressly amends the TORFP. Nothing in the State's responses to these questions is to be construed as agreement to or acceptance by the State of any statement or interpretation on the part of the vendor asking the question as to what the contract does or does not require.

34. Question: Are the writing samples described on page 27 for the three (3) initial proposed personnel required to be submitted with the proposal?

Answer: Yes

35. Question: Would the State please clarify whether Attachments 10 & 11 should be submitted with the TO Technical Proposal as requested in the List of Attachments?

Answer: Attachments 10 and 11 should be submitted with the Technical Proposal.

36. Question: Section 2.1, page 11 of the TORFP states "Duties and responsibilities for the desired support resources are described in Section 2.5." Would the state please confirm the section referenced? Should this be Section 2.6?

Answer: The correct section for this reference should be Section 2.6.3.

37. Question: There appear to be some discrepancies between the table in Section 2.6.1 and the list in Section 2.6.4 as it relates to CATS+ Labor Categories. Section 2.6.4 and Attachment 1 as revised in Amendment 1 also appear to have discrepancies. These discrepancies appear to affect the following positions: Sr. Marketing Consultant, Quality Manager, Voter Outreach Manager, Training Coordinator, Trainers and Warehouse Manager.

Please clarify the CATS+ Labor Category for each of these positions.

Q&A #4
CATS+ TORFP
PROJECT NO. D38B4400009
January 9, 2014

Answer: The CATS+ Labor Category for each position referenced, should read as follows:

Table 2.1, pages 12 and 13:

| # | Resource Type | CATS+ Labor Category |
|----|--------------------------|---------------------------------------|
| 10 | Sr. Marketing Consultant | Market Research Consultant (Senior) |
| 11 | Quality Manager | Quality Assurance Consultant (Senior) |
| 13 | Voting Outreach Manager | Marketing Consultant (Senior) |
| 15 | Training Coordinator | Training Specialist/Instructor |
| 16 | Trainers | Training Specialist/Instructor |
| 20 | Warehouse Manager | Facility Operations Supervisor |

Section 2.6.4 Page 17

- 2.6.4.7 Senior Marketing Consultant (Market Research Consultant-Senior, page 66)
- 2.6.4.8 Quality Manager (Quality Assurance Consultant-Senior, page 72)
- 2.6.4.10 Voter Outreach Manager (Marketing Consultant-Senior, page 66)
- 2.6.4.12 Training Coordinator (Training Specialist/Instructor, page 79)
- 2.6.4.13 Trainers (Training Specialist/Instructor, page 79)
- 2.6.4.17 Warehouse Manager (Facility Operations Supervisor, page 60)

38. Question: In Section 2.8.4 on page 25, the Acceptance Criteria for ID# 2.7.4.1 states “Timesheets shall meet requirements in Section 2.6.4.17.” Would the State please confirm the section referenced? Should it be 2.6.3.17 or 2.11.1?

Answer: The sentence should read “Timesheets shall meet requirements in Section 2.11.1.”

39. Question a) In Section 2.9.2 on pages 26 through 28, would the state please clarify whether the requested sample documentation associated with each position is expected with the proposal response or whether it should be provided upon State request?

Answer: The requested sample documentation is expected with the Offeror’s response.

Question: b) If samples are required with the proposal, can they be included as PDF’s in the Attachment file to avoid exceeding the 10MB submittal limit?

Answer: Yes

40. Question: In Section 3.3 on page 31, there appears to be a discrepancy on where Attachment 2 should be included in the Offeror’s responses. Section 3.3 requests these forms in the “TO Technical Proposal” while the List of Attachments on page 38 states “Submit with TO Financial Proposal.” Would the State please clarify where Attachment 2 forms are to be included in Offeror’s responses?

Q&A #4
CATS+ TORFP
PROJECT NO. D38B4400009
January 9, 2014

Answer: Attachment 2 forms should be submitted with the Offeror's TO Technical Proposal.

41. Question: Would the State please clarify whether the table in Section 3.4.1 on page 32 should be updated to reflect the revisions made to Section 2.9.1 in Amendment 1?

Answer: Yes. In the table on page 32, under "Reference" for the entry "2.9.1.1" the Offeror Company Minimum Requirement should read: "Have provided personnel resources from a minimum of 15 different resource types over the course of at least one (1) major project."

42. Question Based on the revisions made to Attachment 5 in Amendment 1, would the State please confirm that Form TM1 is no longer required as part of the proposal submission.

Answer: Submission of Form TM1 is no longer required as part of the submission of Offerors proposals.

43. Question: In Section 3.4.1, Item G) on page 33, would the State please clarify what information in this section should be provided for subcontractors?

Answer: In the first line of Item G) of Section 3.4.1, the words "and Subcontractor" should be stricken. No subcontractor information is required in this section.

44. Question: In the revised version of Attachment 1 provided in Amendment #1, the CATS+ Labor Category for Training Coordinator is still listed as "Training Specialist/Coordinator". Would the State please confirm that this should be revised to read "Training Specialist/Instructor"?

Answer: The CATS+ Labor Category for Training Coordinator in the revised version of Attachment 1 provided in Amendment #1 should state "Training Specialist/Instructor."

45. Question: Section 4.4 of Attachment 3 states "In addition to any other available remedies, if, in the opinion of the TO Procurement Officer, the TO Contractor fails to perform in a satisfactory and timely manner, the TO Procurement Officer may refuse or limit approval of any invoice for payment, and may cause payments to the TO Contractor to be reduced or withheld until such time as the TO Contractor meets performance standards as established by the TO Procurement Officer."

Would the State please define the performance standards referenced in this section, or would the State be willing to modify this section to limit non-payment to the deliverable/invoice in question?

Answer: The standards of performance for each resource and the associated deliverables will be evaluated in accordance with Attachment 18 of this TORFP. Any additional

Q&A #4
CATS+ TORFP
PROJECT NO. D38B4400009
January 9, 2014

performance standards will be part of each Work Order. The State will modify this section to limit the refusal of payment to all or part of the specific invoice in question.

46. Question: Based on the revisions made to Attachment 5 in Amendment 1 that remove the requirement to submit Attachment 5A-Form TM1, would the State please clarify if or how Offerors should address the following instructions that relate to Attachment 5A-Form TM1, as they do not appear to have been deleted as part of Amendment 1?

“Part B) Other TORFP Minimum Qualifications: For each job title above, the Master Contractor shall insert each specific minimum qualification requirement listed in the solicitation. Each minimum requirement shall be followed by one or more examples that demonstrate how the proposed resource meets the minimum requirement. Account for all minimum qualifications, including any experience, education, or professional certifications.

Part C) Other Personnel Requirements: After all minimum qualification requirements, the Master Contractor shall insert any other personnel requirements listed within this TORFP and describe how the proposed resource meets those requirements. “

Answer: For Attachment 5 as amended in Amendment #1, all instructions beginning with Section 4, c) through the end of the attachment are now deleted and are no longer part of the TORFP. This shall include Part A), Part B) and Part C).

47. Question: Based on the revisions made to Attachment 5 in Amendment 1, would the State please clarify how Offerors should complete the following section of Attachment 5 on page 62, or is this no longer required?

“B) Requirements Qualification Traceability Matrix

Complete the matrix (Attachment 5A) for each requirement listed for the position in either the CATS+ Master Contract and/or this TORFP.”

Answer: The instruction labeled “B)” on page 62 of Attachment 5 Form LC1 should be deleted, and Offerors are not required to complete this item.

48. Question: Will the TO Contractor be required to develop software that falls within the Custom Software Deliverable of Section 6 of the CATS+ main agreement? (i.e. is the state going to want a software developer or not?)

Answer: The need for a software developer will be determined in the future and is not known at this time. Should the SBE issue a Work Order to provide a software developer, it is unknown at this time whether the software developer will be used to develop custom software deliverables, to make modifications to existing code or perform some combination of both tasks.

Q&A #4
CATS+ TORFP
PROJECT NO. D38B4400009
January 9, 2014

49. Question: If the State does change the scope of work (such as by increasing the positions from the initial three to 60), how does the State intend to memorialize that in writing?

Answer: Refer to Section 2.1 on page 11, where the need to increase up to a maximum of 60 resources is indicated within the Scope of Work, and to Section 2.11.3 where the TORFP states that resources required other than the original proposed resources shall be requested with Work Orders.

Whitney Faust
Procurement Officer