

**CATS+ TORFP for Independent Verification and Validation (IV&V) Services
TORFP# F50B0600006
Comptroller of Maryland's Compass Program
AMENDMENT #1
January 30, 2020**

Prospective Offerors:

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 Master Contractor responding to this TORFP. For the following changes/additions, any new language has been doubled underlined and marked in bold (i.e. **new**) and any deleted language has been marked with a strikeout (i.e., ~~deleted~~).

1. Remove CATS+ TORFP SECTION 4.12.1 Non-Disclosure Agreement (Offeror)
2. **Add to RFP KEY INFORMATION SUMMARY SHEET/TO Pre-Bid Conference as follows:**
The Dial-in number is 1-260-296-0039 Pin 312 389 237# and provide the names of the individuals who will be calling in to Dapheny.mccray1@maryland.gov.

Issued by:
Dapheny McCray
Procurement Officer

Amendment #2
CATS+ TORFP #F50B0600006
Independent Verification and Validation (IV&V) Services
Comptroller of Maryland’s Compass Program
February 12, 2020

Ladies/Gentlemen:

Amendment #2 is being issued to amend and clarify certain information contained in the above referenced TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP 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. The due date for TO Proposals is amended as follows:

TO Proposals Due (Closing) Date and Time:	February 18 <u>25</u> , 2020 at 09:00 am Location Time Offerors are reminded that a completed Feedback Form is requested if a no-bid decision is made (see Section 5).
--	---

2. The TORFP number in the TORFP header and Attachment A is amended as follows:

Header: F50B06000006
Attachment A, Solicitation Number: F50B060000**36**

3. Section 1.1 Offeror Minimum Qualifications is amended as follows:

There are no Offeror Minimum Qualifications for this procurement. ~~Please see Sections 3.5 and 3.6 for experience and qualifications necessary to be considered reasonably susceptible for award.~~

4. Section 2.4.2.C Deliverable Submission is amended as follows:

For any written deliverable, the TO Contract Monitor may request a draft version of the deliverable in advance of the final due date for that deliverable, to comply with the minimum deliverable quality criteria listed in **Section 2.4.4.**

5. Section 2.4.3.A Deliverable Acceptance is amended as follows:

A final deliverable shall satisfy the scope and requirements of this TORFP for that deliverable, including the minimum quality as defined in Section **2.4.4.**

6. Section 3.5.2 Offeror Experience is amended as follows:

The following experience is expected and will be evaluated as part of the TO Technical Proposal (see the Offeror experience, capability and references evaluation factor from **Section 6.2**). **Offerors not possessing this experience will be technically ranked lower.** Offerors must provide documentation in the TO Proposal that their organization has previous experience with providing IV&V services on projects of comparable size and complexity as the ITS Project ~~and propose a team of resources with the following experience:~~

7. TORFP Section 5.4.2.A.5) is amended as follows:

Draft Risk Assessment: Identification and prioritization of risks inherent in meeting the requirements in Section ~~2~~ **3** - Scope of Work. Includes a description of strategies to mitigate risks. If the Risk Assessment appears as a deliverable in Sections 2-3, that version will be a final version. Any subsequent versions should be approved through a formal configuration or change management process.

8. The third paragraph of TORFP Section 3.6 is amended as follows:

The following experience is expected for the TO Contractor IV&V Project Manager and the roles listed below, and will be evaluated as part of the TO Technical Proposal (see the capability of proposed resources evaluation factor from **Section 6.2**) **(Offerors proposing TO Contractor Personnel not possessing this experience will be technically ranked lower):**

9. Section 6.2 TO Technical Proposal Evaluation Criteria is amended as follows:

6.2.2 Offeror Qualifications, Past Performance and Capabilities, including proposed subcontractors (See TORFP ~~§ 5.4.2.C—~~ **5.4.2.F**).

10. CATS+ TORFP #F50B0600006 – COMPASS IV&V – TO Financial Proposal – Attachment B.xls, is and replaced in its entirety. The amended Attachment B is incorporated into the CATS+ TORFP #F50B0600006 through this amendment.

Issued by:
Dapheny McCray
Procurement Officer

Amendment #3
CATS+ TORFP #F50B0600006
Independent Verification and Validation (IV&V) Services
Comptroller of Maryland's Compass Program
February 24, 2020

Ladies/Gentlemen:

Amendment #2 is being issued to amend and clarify certain information contained in the above referenced TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP 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~~).

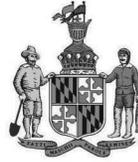
1. The due date for TO Proposals is amended as follows:

TO Proposals Due (Closing) Date and Time:	February 25 <u>March 3</u> , 2020 at 09:00 am Location Time Offerors are reminded that a completed Feedback Form is requested if a no-bid decision is made (see Section 5).
--	--

Issued by:
Dapheny McCray
Procurement Officer

Larry Hogan
Governor

Boyd K. Rutherford
Lt. Governor



Ellington E. Churchill, Jr.
Secretary

MARYLAND DEPARTMENT OF GENERAL SERVICES
OFFICE OF THE SECRETARY

Amendment #4

Consulting and Technical Services+ (CATS+)
Task Order Request for Proposals (TORFP)
#F50B0600060
Independent Verification and Validation

September 24, 2020

Ladies/Gentlemen:

This Amendment is being issued to amend and clarify certain information contained in the above referenced TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP 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. Amend TORFP Section 5.4.E Master Contractor and Subcontractor Experience and Qualifications (reference Section 3.7.2) as follows:

The Master Contractor shall provide three references ~~and five past performances (submit Appendix 4 for past performances)~~ for contracts completed within the last five years (no more than one may come from a Subcontractor), that were similar to the requested scope of work.

2. Amend TORFP Section 7 – TORFP Attachments and Appendices table as follows:

	Label	Appendix Name
When to Submit		
With Technical Proposal	4	Past Performance Rating Form

3. **Appendix 4. Past Performance Rating Form is removed from the TORFP.**

Issued by:
Dapheny McCray
Procurement Officer



Larry Hogan
Governor

Boyd K. Rutherford
Lt Governor



Ellington E. Churchill, Jr.
Secretary

Nelson E. Reichart
Deputy Secretary

OFFICE OF STATE PROCUREMENT

Amendment #5

Consulting and Technical Services+ (CATS+)
Task Order Request for Proposals (TORFP)
#F50B0600060
Independent Verification and Validation

December 30, 2020

Ladies/Gentlemen:

This Amendment is being issued to amend and clarify certain information contained in the above referenced TORFP. All information contained herein is binding on all Offerors who respond to this TORFP. Specific parts of the TORFP 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 strikeout (i.e., ~~word~~).

1. Revise TORFP Section 5.5 TO Financial Proposal to reflect:

5.5.5. Prices shall be valid for ~~120~~ **210** days.

Issued by:
Dapheny McCray
Procurement Officer



Questions and Answers #1
CATS+ TORFP for Independent Verification and Validation (IV&V) Services
TORFP# F50B0600006
Comptroller of Maryland's Compass Program

Ladies and Gentlemen:

This list of questions and responses is being issued to clarify certain information contained in the above referenced TORFP. The State's responses are italicized. The statements and interpretations contained in responses to any questions, whether responded to verbally or in writing, are not binding on the Department unless the TORFP is expressly amended. Nothing in any response to any questions is to be construed as agreement to or acceptance by the Department of any statement or interpretation on the part of the entity asking the question.

1. Question: Can the offeror experience indicated in section 3.5.2 be demonstrated between the Prime and the Subcontractor? Is the subcontractor experience valid for evaluation purposes?

Response: Yes, subcontractor experience may be used for evaluation purposes provided the subcontractor will be used to perform the services required under the IV&V if the offeror is awarded a task order.

2. Question: Can you please let us know if there is an incumbent for this position?

Response: There is no incumbent.

3. Question: Is there an incumbent performing the scope of work?
 - a. If so, what is the name of the company?
 - b. How long have they been performing the work?
 - c. Are they eligible to bid again?

Response: Please refer to the response to Question #2.

4. Question: Are there any personnel that are currently working on this project that would need to be transitioned to the winning bidder?

Response: Please refer to the response to Question #2.

5. Question: Will there be a teleconference (call-in) capability for this pre-proposal conference? If so:
 - a. Can you provide the teleconference information, and
 - b. Do you need to know the names of the individuals who will be calling in?

Response: Yes; please provide the names of the individuals who will be calling in to Dapheny.mccray1@maryland.gov. The Dial-in number is 1-260-296-0039 Pin 312 389 237#

6. Question: Can you tell me whether this was sent to all CATS+ Master Contractors in Functional Area 10 or just to a select subset.

Response: All Master Contractors awarded a Master Contract in Functional Area 10 were sent the TORFP as required.

7. Question: Is there any chance you can set-aside a portion of this effort for a VSBE certified firm?

Answer: There is no VSBE goal assigned to this TORFP.

Questions and Answers #2
CATS+ TORFP for Independent Verification and Validation (IV&V) Services
TORFP# F50B0600006
Comptroller of Maryland's Compass Program

Ladies and Gentlemen:

This list of questions and responses is issued to clarify certain information contained in the above referenced TORFP. The State's responses are italicized. The statements and interpretations contained in responses to any questions, whether responded to verbally or in writing, are not binding on the Department unless the TORFP is expressly amended. Nothing in any response to any questions is to be construed as agreement to or acceptance by the Department of any statement or interpretation on the part of the entity asking the question.

1. Question: Can the department consider Team experience in addition to Offeror's experience?

Response: Team experience may be used for evaluation purposes provided the team will be used to perform the services required under the IV&V if the Offeror is awarded a task order.

2. Question: Is there an incumbent for this work?

Response: There is no incumbent contractor as this is a new requirement.

3. Question: Please provide incumbent name, contract details?

Response: See response to Question #2.

4. Question: Had there been any incumbent or contractors current or in past who drafted the SoW? Please name such contractors?

Response: There is no incumbent contractor. This is a solicitation for a new IV&V requirement

5. Question: Do any of the resources who worked on the SoW allowed to respond?

Response: No, please refer to Md. Code Ann., State Finance and Procurement Article §13-212-1.

6. Question: Please list the companies who worked on this SOW and confirm if they're OCI or allowed to be part of a team?

Response: Please refer to responses to Questions #4 and #5 above.

7. Question: How is the evaluation going to be rated for a Federal Government IV&V project experience of similar characteristics?

Response: Per TORFP Section 6.2, the criteria to be used to evaluate each TO Technical Proposal are listed in descending order of importance. Unless stated otherwise, any sub-criteria within each criterion have equal weight.

8. Question: Can the Government consider extending the response date by two weeks?

Response: The response due date has been extended to February 25, 2020. Please refer to Amendment #2 to the TORFP.

9. Question: Section 2.2.4, is the Compass program on schedule currently? Is Release 1a in Joint System Testing now? Will it be completed by the time when this task is awarded?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

10. Question: Has release 1b completed the design/config/build/UT phase as scheduled?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

11. Question: Will released 1b be in Joint System Test by the time this task is awarded?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

12. Question: Section 2.4.2 C contains a missing reference, what section should this refer to?

Response: Please refer to Amendment #2 to the TORFP.

13. Question: What system is used by the department to record the risks and store artifacts consistent with the Risk Management Framework?

Response: The State has no additional background information to provide outside of TORFP Section 2.2.

14. Question: Section 5 and 6.4B indicates Orals may be required, Section 6 indicates the Committee will participate in oral presentations implying orals are required, which section is correct? Are Orals required? If so, what are the instructions governing Orals?

Response: Whether Oral presentations will be required for this TORFP is at the State's discretion. See TORFP Section 4.5 Master Contractors will be so advised.

15. Question: What are the COTS products that support the tax functionality, scanning and imaging hardware and software, content management for the new Integrated Tax System (ITS) Solution?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

16. Question: Are licensing, patches, upgrades for these COTS products a part of GFE?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

17. Question: Are licensing, patches, upgrades for these COTS products a part of GFE?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

18. Question: Is there a requirement for Data Migration from the existing SMART system to the new ITS solution?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

19. Question: Is the current SMART system integrated with the COM's existing Teradata data warehouse?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

20. Question: What is the proposed technology stack for the ITS solution? Is the platform envisioned to be hosted on the cloud(AWS/Azure/GCP) or on-premise?

Response: The State has no additional status information to provide outside of TORFP Section 2.2.

21. Question: CATS Contract, According to #21 of the CATS contract between [REDACTED] and the State of Maryland, if we enter into a contract in excess of \$100,000, we will be required to file with the Secretary of the State certain specified information to include disclosure of beneficial ownership of the business. Can the State of Maryland please identify what type of information this refers to? What sort of documentation would [REDACTED] be required to disclose?

Response: Please refer to Maryland Code Ann. State Finance & Procurement Article §13-221.

22. Question: What Section should paragraph 2.4.2(C) on page 22 reference? Currently, it states “**Section Error! Reference source not found.**”

Response: Please refer to Amendment #2 to the TORFP.

23. Question: Section 3.5.2 Can our firm’s experience be expanded to include IV&V projects in other similarly complex environments?

Response: See TORFP Section 5.4.2 F.

24. Question: Section 3.6 Some of the roles listed in the TORFP don’t match the labor categories for the CATS+ contract. Can you please provide us with a cross-walk so that we understand what the minimum qualifications are for each TORFP role and correctly fill out Appendix 4?

Response: Offerors are required to specify the CATS+ Labor Category they wish to propose to meet the requirements for each role listed in Section 3.6 and Attachment B – Financial Proposal.

25. Question: Section 3.6 The experience/qualifications required of the staff appears to be high; would you consider reducing the number of years each role must bring to this project?

Response: No.

26. Question: Section 3.6 Is only the IV&V Project Manager a key role for this project?

Response: The IV&V Project Manager is a required Key Personnel. In addition, the Offeror is to identify proposed personnel that the Offeror considers See TORFP Section 3.6.

27. Question: Section 3.6 What is the expected level of effort for the roles in terms of FTEs per role and what are the on-site expectations for each role?

Response: One FTE is expected to serve in each role. In addition, as indicated in the Key Information Summary Sheet, the Primary Place of Performance are the Compass Program Offices, 45 Calvert Street, Annapolis, MD 21401. Offerors may assume 100% of the effort will be conducted at this site.

28. Question: Section 3.6 May we propose more than the roles laid out in Section 3.6 in our staffing plan? Also, may one person provide two roles if the level of effort is maintained for each?

Response: Offerors may not add roles outside of those required in the TORFP, Section 3.6. One person may not provide two roles to fulfill the requirements of the TORFP.

29. Question: Section 3.6 Will the staff requirements in Section 3.6 be scored, based on the vendor’s proposal, or if these requirements are not **fully met** is this grounds for disqualification of the entire vendor response?

Response: The experience identified in Section 3.6 is expected for the TO Contractor’s IV&V Project Manager and the roles listed and will be evaluated as part of the TO Technical Proposal in accordance with TORFP Section 6.2 Evaluation Criteria. Also, see Amendment #2.

30. Question: Section 2.4 Will the IV&V team’s deliverable review efforts be the only state review for these deliverables or will there be additional state SME review for each deliverable?

Response: As the scope of review is vast, the level of review will vary based on the State’s need and availability.

31. Question: Section 3.6 Is the state open to alternative staffing models that reflect our experience performing IV&V in other states, and similar to how we are currently staffing an IV&V project for the implementation of an RSI tax system?

Response: The State is not seeking alternative models.

32. Question: Section 5.4.2 In responding to the “Proposed Solution” section of the TORFP, does the State mean to say that we should provide our proposed solution “organized to exactly match the requirements outlined in Sections 2.3? or Sections 2 and 3? If the expectation is a response to Sections 2 and 3, please provide details about what subsections within those two sections we will need to respond to as there are many subsections in Sections 2 and 3 that provide information but don’t require a response.

Response: The response is to include the requirements in both Section 2 and Section 3, addressing each subsection accordingly.

33. Question: Given the short timeframe between when questions are due and proposals are due, would the State consider extending the deadline?

Response: Yes, see response to Question #8 above in addition to Amendment #2.

34. Question: Section 3.6 states, "Offerors shall identify proposed personnel that are considered key personnel..." However, the chart on page 31 identifies the PM as key personnel. Does this mean that we can identify additional key personnel to be included along with the key PM?

Response: Yes, please see the response to Question #26 above.

35. Question: At the Pre-Proposal Conference, the State indicated a need for insights into emerging technologies in addition to deep tax expertise. However, the RFP does not stipulate this as a written requirement. Will the State clarify this requirement?

Response: The information offered at the Pre-Proposal Conference was communicated as indicated in the TORFP. The Offeror is encouraged to provide a solution as detailed and requested in the TORFP.

36. Question: RFP Section 3.5.2 states: "Offerors must provide documentation in the TO Proposal that their organization has previous experience with providing IV&V services on projects of comparable size and complexity as the ITS Project and propose a team of resources with the following experience," followed by several criteria that the personnel, not the firm, must meet.

Response: Please see Amendment #2, amending Section 3.5.2 of the TORFP.

37. Question: RFP Section 6.2 includes "Proposed Personnel and TORFP Staffing" (5.4.2.C) in both the second and third ranked evaluation criteria, seemingly double-counting proposed personnel and highlighting the importance to the State of the proposed personnel.

Response: Please see Amendment #2, amending Section 6.2.2 of the TORFP.

38. Question: Tab C of the financial proposal simply compares offerors' blended hourly rates and prescribes an approach of a team of five full time employees. This does not allow the State to consider the true value and efficiency of a proposed solution or team that may have a different resource mix, require fewer hours to deliver the requested services, or use data, tools, intellectual property, and other resources for efficiency. An offeror that can deliver the requested services more efficiently will be unfairly evaluated at a higher cost based on the formula used in this tab (5 FTE over 5 years).

Response: The State is not open to alternate approaches

39. Question: Can the State confirm that it wishes to evaluate offerors on the experience and resumes of five named full-time individuals and is not open to alternate approaches? Will the State consider amending the financial proposal template to allow more flexibility (e.g., allow offerors to specify hours per role, different labor categories, fixed-price deliverables)?

Response: The State is not open to alternate approaches.

40. Question: Tab A states "1. On the Tab B "Evaluated Price" sheet, fill-in the white fields only for Fixed Priced deliverable pricing." However, no Tab B is provided. If the State is amenable to alternate approaches (other than five full-time named individuals), will the State allow a Fixed Price, Deliverables-Based bid and add Tab B to the financial proposal template? A fixed-price approach can shift risk to the offeror and maximize value by allowing offerors to bring different resources over time as necessitated by the COMPASS program as it evolves.

Response: Please refer to Amendment #2 revising Attachment B. In addition, the State is not open to alternate approaches.

41. Question: TORFP Section 5.4.2.A.2 states “The proposed solution shall be organized to exactly match the requirements outlined in Sections 2-3,” however, Sections 2 and 3 span many topics and it is unclear specifically which requirements should be addressed in order to organize the response to “exactly match” the requirements outlined.

Response: Please refer to the response to Question #32 above.

42. Question: Can the State please clarify which subsection(s) of Sections 2 and 3 should be addressed in response to Section 5.4.2.A.2? Will the State accept a traceability matrix to map proposal content to RFP requirements and allow flexibility in the proposal structure?

Response: Please refer to the response to Question #32 above.

43. Question: TORFP Section 5.4.2.A.5 states “...in meeting the requirements in Section 3 – Scope of Work.” However, Section 3 is labelled “General” and Section 2 is labelled “Scope of Work.” Can the State confirm that this section of the response should address the requirements in Section 2?

Response: Please refer to Amendment #2 amendment Section 5.4.2.A.5 of the TORFP.

44. Question: Can you provide the RFP for the ITS solution solicitation? This will help us understand what deliverables were included in that contract and will need to be reviewed as part of the IV&V services. If the winning solicitation can be shared, that would be helpful as well.

**Response: The RFP is accessible via the following-
https://doit.maryland.gov/contracts/Documents/catsPlus_torfp_status/E00B840029-ComptrollerofMD-ITS-RFP.pdf**

45. Question: What is the current phase of the project implementation? What are the current statuses of Releases 1a, 1b and 2?

Response: The State has no additional status information to provide outside of Section 2.2 of the TORFP.

46. Question: Can you provide a list of development & testing tools including the test automation suite that are going to be utilized for the project?

Response: The State has no additional status information to provide outside of Section 2.2 of the TORFP.

47. Question: In the financial response form, Tab B was not provided; we can only locate Tab A – Instructions and Tab C – Labor Rates for potential T&M work orders. Could you confirm there is no Tab B?

Response: Attachment B – Financial Proposal has been amended, please refer to Amendment #2 to the TORFP.

48. Question: Can you provide the RFP for the ITS solution solicitation? This will help us understand what deliverables were included in that contract and will need to be reviewed as part of the IV&V services. If the winning solicitation can be shared, that would be helpful as well.

Response: Please refer to the response to Question #44 above.

49. Question: In the financial response form, Tab B was not provided; we can only locate Tab A – Instructions and Tab C – Labor Rates for potential T&M work orders.

Response: Attachment B – Financial Proposal has been amended, please refer to Amendment #2 to the TORFP.

50. Question: Section 3.6 states, "Offerors shall identify proposed personnel that are considered key personnel..." However, the chart on page 31 identifies the PM as key personnel. Does this mean that we can identify additional key personnel to be included along with the key PM?

Response: Please refer to the response to Question #26 above.

51. Question: The TORFP number in the header is F50B06000006 but the TORFP number on the title page is F50B0600006. Furthermore, the TORFP number on Attachment A has F50B0600003 listed as the TORFP number. Can you clarify the correct TORFP number for this solicitation please?

Response: Please refer to Amendment #2 to the TORFP.

52. Question: In the following section 3.5.2, requires an IT project experience of \$50,000,000 (50 million) in size. Please advise if this is a requirement as it will preclude a lot of companies from bidding on this.

Response: Please refer to Amendment #2 to the TORFP.

Questions and Answers #3
CATS+ TORFP for Independent Verification and Validation (IV&V) Services
TORFP# F50B0600006
Comptroller of Maryland's Compass Program

Ladies and Gentlemen:

This list of questions and responses is issued to clarify certain information contained in the above referenced TORFP. The State's responses are italicized. The statements and interpretations contained in responses to any questions, whether responded to verbally or in writing, are not binding on the Department unless the TORFP is expressly amended. Nothing in any response to any questions is to be construed as agreement to or acceptance by the Department of any statement or interpretation on the part of the entity asking the question.

53. Question: Page 44, Section 5.4.2.F.2 states “**the Master Contractor** shall submit a list of all contracts it currently holds or has held within the past five years with any entity of the State of Maryland”
- a. Will the state consider a list from the Master Contractor and Subcontractor team?

Response: Section 5.4.2.F.2, asks for a list of all contracts the Master Contractor currently holds or has held within the past five years with any entity of the State of Maryland. There is no requirement for this information from any proposed subcontractor. Please note that State of Maryland experience is neither required nor given more weight in proposal evaluation.

54. Question: Page 29 states “Demonstrable experience providing IV&V services for a **minimum of three** (3) IT implementation projects that involved federal, state, or local tax administration. Page 44 states “**Provide up to three** examples of engagements or contracts the Master Contractor or Subcontractor”
- a. What is the maximum number of engagements can we submit for past performance?

Response Please refer to Amendment #4 amending TORFP Section 3.5.2.A. See also Section 5.4.2F(1)

55. Question: Page 31, 3.6.a IV&V Project Manager, “At least ten (10) years of experience leading IV&V engagements of scope and complexity comparable to the Compass Program.”
- a. We often find that effective delivery of IV&V services is a product of previous IV&V experience and prior work on engagement teams responsible for implementing systems driven transformation initiatives. This enables IV&V personnel to have an implementation mindset when assessing project performance and to identify practical

and value added recommendations that are likely to make a meaningful difference in the productivity of the project team and achieving designated project outcomes. Would the State permit a portion of the 10 years of experience requirement for the Project Manager to be filled with experience as a project manager or other comparable role on a team responsible for a software implementation of scope and complexity comparable to the Compass Program?

Response: No.

56. Question: Page 42, Section 5.4.1 states “All pages of both TO Proposal volumes shall be consecutively numbered from beginning (Page 1) to end (Page “x”)
- a. Is the cover page inclusive of Page 1? If yes, should we list Page 1 on the cover page?

Response: The State is indifferent as to the start of the page numbering as long as page numbering and references in the Table of Contents are clearly indicated.

57. Question: Page 43, Section 5.4.2.C.2 references Appendix 4 – Labor Classification Key Personnel Resume Form for each proposed Key Personnel
- a. Should the Appendix 4 Resume Form be included in Section 5.4.2.C.2 or in Section 5.4.2.I.1 Attachments and Exhibits?

Response: Include the Appendix 4 in the response to TORFP Section 5.4.2.C.

58. Question: Page 43, Section 5.4.B states “The Offeror Information Sheet (see Appendix 2) and a Transmittal Letter shall accompany the TO Technical Proposal”
- a. Should Appendix 2 Offeror Information Sheet be included in Section 5.4.B or in Section 5.4.2.I.1 Attachments and Exhibits?
 - b. Should the Transmittal Letter be included in Section 5.4.B or in the front as a cover letter?

Response: Appendix 2- Offeror Information Sheet, should be included with the Technical Response in the attachments and exhibits section. Generally, the transmittal letter should be included at the front of the Technical Proposal.

59. Question: What type of implementation methodology does the Compass program plan to follow? (e.g. Waterfall, Agile, Agile Hybrid, etc.)

Response: All Major Information Technology Development Projects (MITDP) are to follow the State’s System Development Life Cycle following an interactive schedule.

60. Question: Can the state describe the approach how they will administrate work from a Time and Materials perspective? What estimates and pre-approvals require sign off by the state before beginning work?

Response: As indicated in TORFP Section 2.4 Deliverables, specifically Deliverable ID #2.4.4.1, these administrative matters will be addressed in the kick-off meeting to further define roles and responsibilities, establish logistical details and communication expectations, and clarify IV&V tasks as needed.

61. Question: Page 9-10 – Section 2.2.5.1 Compass Program Governance and Management Roles – The organization chart on page 10 includes roles that are filled by COM, IC, and TO. Which, if any of the roles/boxes in the organization chart are expected to be filled by the successful respondent to this solicitation?

Response: The Project Manager IV&V is the only role/box in the organization chart at 2.2.5.1 that will be filled by the successful offeror. See RFP Section 3.6.a.

62. Question: Page 11, Section 2.3.2 – What are the differences in the roles and responsibilities of the TO Contract Monitor, Compass Risk Officer (RO), DoIT Oversight Manager and the Program Sponsor?

Response: These roles are common to most IT implementation projects. Each role is filled by State staff. Their role and responsibilities will be further defined at the kick-off meeting as described in TORFP Section 2.4.4.1.

63. Question: Page 16 – Section 2.4.4. IV&V Weekly Status Project Reports. The description of this deliverable indicates that such reports shall be submitted “bi-weekly”. Please clarify the frequency with which these reports are required to be submitted.

Response: Bi-weekly is defined as every two weeks.