Insert Institution’s Logo

 **<Project Name>**

Task Order Request for Proposal (TORP) Solicitation No. \_\_\_\_\_\_

Being procured under the

**MEEC IT Professional Consulting Services Master Agreement 91372**

Service Category #: <Category Title>

*The Master Agreement 91372 Terms & Conditions will be incorporated into*

*any resulting purchase order/ task order contract.*

|  |  |
| --- | --- |
| **Issued By:**<Institution Name><Address>**Point of Contact:**<Name, Title><Email Address, Telephone number> | **TORP Solicitation Number:** \_\_\_\_\_\_\_**Issue Date:**\_\_\_\_\_\_\_, 2020**Deadline for Questions:**\_\_\_\_\_\_\_\_, 2020 at 3:00 pm**Proposal Due Date and Time:**\_\_\_\_\_\_\_\_\_, 2020 at 3:00 pmProposals must be submitted by email as attachments. See Section 12 for instructions. |

In compliance with the specifications and terms and conditions of this TORP <Number>, the undersigned agrees, if this offer is accepted by the <Institution Name>, the Offeror will furnish any or all services contracted for by the <Institution Name>.

|  |
| --- |
| ***TO BE COMPLETED BY THE FIRM OFFERING A PROPOSAL*** |
| NAME & ADDRESS OF OFFERORFEIN Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | SIGNATURE OF PERSON AUTHORIZED TO SIGN PROPOSAL | PROPOSAL DATE |
| SIGNER’S NAME & TITLE | TELEPHONE NO. |

# Background

<Insert the background of the issuing Institution>

# Scope of Work *[An example SOW is provided in Exhibit A on pg. 11]*

The <Institution Name> seeks a consultant to provide <describe project, tasks, needs, timeframe, goals, stakeholders, deliverables, etc.>

# Description of Work/Deliverables

The <Institution Name> requires the awarded firm perform the following services:

**3.1 Activities** <complete the items below as needed or use a different format>

1. Identify…
2. Assess…
3. Review…
4. Recommend…
5. Report…

**3.2 Approach**

1. .
2. .
3. .

**3.3 Deliverables**

1. A preliminary results document that reviews the initial findings.
2. Final report with:
3. ;
4. ;
5. ; and
6. .
7. Presentation of findings ….. as determined by the <Institution Name>).

All documents, diagrams, materials provided in connection with this engagement are the sole and exclusive property of <Institution Name> and are proprietary and confidential. All documents, diagrams, and other material provided by <Institution Name> must be returned to the <Institution Name> at the conclusion of this agreement.

All Deliverables are considered to be “Works for Hire” and will be the sole and exclusive property of the <Institution Name> and will be proprietary and confidential to <Institution Name>.

# Required Schedule of the Work/Deliverables

The <Institution Name> is seeking a 6-10? week project and request the project to start the beginning of <Month>, or as soon as is practical after a contract award is made and conclude by the end of <Month> or mid-<Month>.

Consultants are expected to be on site Monday through Friday, 8 am to 5 pm or as required to complete the completed activities. Consultants will provide their own laptops. The <Institution Name> will provide access to appropriate applications as necessary.

The <Institution Name> will provide feedback (acceptance or rejection) on deliverables within 5 business days. The successful Vendor will have 5 business days to correct any deficiencies in the deliverables. (This is a modification for this TORP to Section 6 of the Master Agreement).

# Minority Business Enterprise (MBE) Requirements

# *MBE goals are optional. The MBE documents are in the RFP, Appendix M, pgs. 53-67.* If there is no MBE goal, use:

There is no MBE subcontractor participation goal for this procurement.

If there is an MBE goal, use:

# A ?% subcontracting goal to Maryland State Certified MBE’s is established for this TORP. Master Contractors are to complete the attached MBE Forms and include them in their Task Order Proposal. The *MBE Attachment A - Acknowledgement of Task Order MBE Requirements* must be completed, signed and submitted by the Master Contractor together with the Task Order Proposal (TOP). If a Contractor believes that a waiver of some or all of the MBE goal and/or sub-goals is necessary, the waiver request must be clearly indicated on *MBE Attachment A - Certified MBE Utilization and Fair Solicitation Affidavit*.If Contractor does not submit Attachments A with its TOP, the Contractor’s TOP will be eliminated from consideration for award.

MBE Attachments B-D and waiver documentation, if applicable, shall be submitted by the apparent TORP awardee within 10 working days of notification of award. If the apparent TORP awardee fails to return the requested documentation within the required time, the contract offer may be withdrawn.

# <Institution Name> Responsibilities

# The <Institution Name> will provide consultants space at the \_\_\_\_\_\_\_\_\_office <Office Address> and will provide access to parking and systems as needed.

# Proposal Criteria (Edit as needed)

The purpose of this response is to display full comprehension of the services to be provided and **how** such services will be provided.

It is the Proposer’s responsibility to tailor its responses to the proposal contents indicated in items 7.1 through 7.7 below to demonstrate its qualifications to perform the required scope of work as provided in items 2, 3, and 4 above. Proposers are requested to compile their proposals in the same order as requested below.

## 7.1 Company Profile

The Proposer is to provide anarrative regarding the Company Profile, to include the following elements:

1. A brief history of the firm’s provision of consulting services of a similar nature to those sought in the Scope of Work.
2. How long firm the firm has been providing such services.
3. Address of the branch office(s) that will be serving on the resulting project.
4. Annual sales volume of consulting services projects for the branch office that will service the project, on a per year basis for the last three (3) years.

## 7.2 Demonstration of Prior Work

The Proposer is to provide detailed explanations and examples of similar projects and work products produced for other firms, including:

1. Overview of the methodology Proposer followed to conduct assessments.
2. Examples of previous consulting engagements of this nature the Proposer has produced for firms/institutions of similar size and scope as the <Institution Name>.

## 7.3 Company Experience/ References

Provide two (2) client contacts similar to the <Institution Name> in scope and size. Specifically, the firm should provide client references where the firm has provided consulting services of a similar or analogous nature as what the <Institution Name> is seeking. Please include name, title, role on the contract, phone number (including area code and extension numbers) and email address. Proposers are to provide this information as part of the Technical Proposal; however, the <Institution Name> will check references only of the clients of the shortlisted proposing firms. The <Institution Name> reserves the right to verify all information given if it so chooses, as well as, to check any other sources available including itself even if not provided as a reference by the Proposer.

It is imperative that the contact names and phone numbers given for the contracts/clients listed are accurate. The contact person should be capable of speaking to a firm's capability in performing the services required. References will be held in the strictest of confidence by the <Institution Name>.

**7.4 Approach and Methodologies**

Provide a narrative of how your firm will provide the requested services in the Scope of Work. Include in this narrative:

1. Description of the proposed methodology preparing the deliverables outlined in the Statement of Work for the project.
2. Project breakdown and anticipated timeline for the activities required to accomplish the scope of work and provide the required deliverables by the required project completion date of \_\_\_\_\_\_\_\_\_\_, 2020.
3. Include <Institution Name> resource needs and responsibilities in the Approach.
4. Include any assumptions in the Approach. Note: The assumptions may not modify the terms and conditions of the Master Contract.
5. Utilization of Subcontractors, if any, that are proposed to provide some of the required services. If subcontractors will provide some or all of the required services, the <Institution Name> may request references of the subcontractors; past working relationships with the Master Contractor; firm experience, MBE status/allocation, etc. to be provided for the subcontractor.

**7.5 Project Management and Staffing of the Contract and Resumes of Key People**

1. **Organizational Chart of the Project Team** should be provided including names, titles, and roles/responsibilities. If any subcontractors are proposed, these should be clearly designated as such. Chart should clearly delineate the lead Consultant and the relationship of the other consultants and management to the lead Consultant.

The staff proposed for consideration must be available for the duration of the project. No personnel changes will be permitted without written authorization from <Institution Name> via a TORP Amendment. The <Institution Name>, at its sole discretion, reserves the right to request personnel changes if deemed in the best interest of the project.

1. **Complete Resume(s) of the proposed Lead Consultant and all other key members of the Project Team are to be provided. Resumes should include:**
2. Consultant’s name and title;
3. Role they are being proposed to perform for the project;
4. Education, including any applicable certifications (such as PMI),
5. Work/employment history including dates of employment and titles/roles held, and similar project experience. A minimum of three (3) similar project experiences should be provided that include brief descriptions of the projects, including the similarities of the projects to this project. Please provide the projects’ contacts (name, title, email, phone number), so that <Institution Name> may check references on the proposed Consultant, if it so elects.

**7.6 Financial Proposal** (Edit as needed)

Pricing is requested to be based on the estimated number of hours and hourly rates by consultant (include name and title), with cumulative total for the project and a fixed and pre-determined fee. The hourly rates for proposed personnel must be either equal to or less than the quoted hourly rates in the MEEC *IT Professional Consulting Services Master Agreement 91372* for the corresponding time period.

There are no allowed reimbursables for this project. That is, the quoted hourly rates for the assigned staff that Proposer applies is to include all costs and expenses associated with the effort required for the project. This includes all Travel and Expenses including provision of the final strategic report in both electronic and printed formats shall be included within the hourly rates if necessary.

Pricing can be submitted via Excel spreadsheet attachment to the Proposal if that meets the needs of the proposer.

**7.7 MBE Attachments** (If applicable)

**Attachments A-TORP and B-TORP MUST be completed and returned with the Master Contractor’s Task Order Proposal. If a Master Contractor fails to provide MBE Attachment A-TORP and B-TORP with its TOP, the Contractor’s TOP will be eliminated from consideration for the award. This is non-curable. See Section 5 above.**

# Questions

Contractors are responsible for carefully reading and understanding fully the terms and conditions of this TORP. All communications regarding this solicitation are to be made solely through the Issuing Office’s Point of Contact. Requests for clarification or additional information must be made **in writing** and emailed to the Point of Contact listed on page 1 and received by him **no later than \_\_\_\_\_\_, 2020 by 3:00 pm**. Such requests should contain the following Subject: **TORP No. #### - Questions**. Only emailed communications relative to the procurement shall be considered.

# All questions will be answered in writing. Both questions and answers will be distributed, without identification of the inquirer(s), to all contractors. No oral communications shall be relied upon for proposal purposes. To the extent that a question causes a change to any part of this TORP, an amendment shall be issued addressing such.

# Solicitation Schedule

Solicitation **issue** date: <Date>

All **questions** submitted by: <Date>, at 3:00 pm

**Answers** to vendors by: <Date>, at noon

**Proposals** due by: <Date>, at 3:00 pm

**Interview** dates: <Date> (If held, via conference call or in person)

Anticipated **award** date: <Date>

Anticipated date Task Order Contract/

Purchase Order **fully executed**: <Date>

Anticipated **start** date: <Date>

**Completion** date for all deliverables: <Date>

# Reimbursables

There are no reimbursables under this contract as the fee and/or hourly rate is to include all expenses.

# Termination for Convenience

The <Institution Name> reserves the right to terminate this task order contract, in whole or in part, at its convenience. The <Institution Name> will pay all reasonable costs incurred by the firm up to the date of termination; however, the firm shall not be reimbursed for any anticipatory profits which have not been earned up to the date of termination.

# Project Management/ Contract Management

The <Institution Name> Office of \_\_\_\_\_\_\_\_\_\_\_\_ will be providing Project Management Services for this Contract.

The <Institution Name> \_\_\_\_\_\_\_\_\_\_\_\_\_ Office will provide contract management services for this task order contract.

# Submissions and Evaluation of the Task Order Proposals (TOP)

Task Order Proposals (TOP) are to be provided by the due date noted on the cover of this TORP. TOPs must be submitted electronically to:

<Institution Contact’s Email Address>

<Institution Contact’s Name>

<Institution Contact’s Title>

<Institution Name>

<Institution Address>

By submitting the TOP electronically, proposing firm is granting the <Institution Name> the permission to provide the TOP to appropriate internal <Institution Name> staff for evaluation purposes. TOPs must be submitted by an individual of the firm who can bind the firm to all contents of the response.

Master Contractors should give specific attention to the identification of those portions of the Task Order Proposal that the Contractor deems to be confidential, proprietary information, or trade secrets and provide any justification why such materials, upon request, should not be disclosed by the State under the Access to Public Records Act, State Government Article, Title 10, Subtitle 6, Annotated Code of Maryland. Contractors are advised that, upon request for this information from a third party, the Procurement Officer is required to make an independent determination as to whether the information may or may not be disclosed to the requesting party. That decision will take into consideration the Contractor’s position regarding its Proposal. A blanket statement by a Contractor that its entire Task Order Proposal is confidential or proprietary will not be upheld.

Task Order Proposals will be evaluated for technical merit as well as price. TOPs will be evaluated for the firm who provides the most advantageous proposal to the <Institution Name> considering qualifications of the Principal Consultant(s) and, if applicable, other potential assigned staff, firm profile and experience, technical approach to providing the services, and price. The <Institution Name> may shortlist and interview the shortlisted firms. If oral Question/Answer sessions are requested, they will be scheduled at the <Institution Name>’s convenience and are anticipated to be held. The proposed Lead Consultant is to attend this session, preferably in person, however, in order to meet the procurement schedule, the <Institution Name> may consider such sessions to be held via WebEx or teleconference.

The technical aspects of the response will weigh greater than the price, that is a Contractor’s response evaluated to be more technically responsive even though it has a higher associated price, may be awarded the Task Order Contract. The decision as to the “most advantageous’ is solely at the <Institution Name>’s discretion.

Further information may be requested by the <Institution Name> during the evaluation process.

The <Institution Name> reserves the right to reject in whole or in part, any and all task order proposals without liability and/or to accept any bid in the interest of the <Institution Name> and/or the State of Maryland.

# Resulting Task Order Contract

Due to the short duration of this engagement, it is anticipated that a Purchase Order will be issued to the selected Master Contractor. The Purchase Order will be the <Institution Name>’s task order contract (TOC) for this engagement. The Purchase Order will, incorporate, by reference, the terms and conditions of the Master Contract, the TORP, and the selected Master Contractor’s response. The order of precedence will remain as stated in the Master Contract. It is not anticipated that any modifications to the terms and conditions of the Master Contract will be accepted by <Institution Name>. Contractors who request such modifications may, as a result, be classified by <Institution Name> as not susceptible of the award.

# Purchase Order Modifications

The awarded Contractor is advised that if they are requested to perform any work deemed outside the scope of the awarded products/services, the Contractor is to submit a proposal for the additional work prior to performing any such work. The <Institution Name>’s Project Manager will review the request and will coordinate appropriately with the Procurement Officer. If the request is approved, the Procurement Officer will issue a written Change Order to the Purchase Order accordingly. If the Contractor proceeds with any additional work prior to receiving a Change Order, they do so at their own risk.

END OF TASK ORDER REQUEST FOR PROPOSAL

***<Add MBE Attachments A-C, as needed per Section 5. Forms provided in RFP pgs. 57-67>***

**ATTACHMENT C - TORP**

**Outreach Efforts Compliance Statement**

***(Submit within 10 working days after notification of apparent award of TOC)***

In conjunction with the bid or offer submitted in response to TORP No. \_\_\_\_\_\_\_\_\_\_\_, I state the following:

1. Bidder/ Offeror identified opportunities to subcontract in these specific work categories:
2. Attached to this form are copies of written solicitations (with bidding instructions) used to solicit certified MBEs for these subcontract opportunities.
3. Bidder/Offeror made the following attempts to contact personally the solicited MBEs:
4. 🞎 Bidder/Offeror assisted MBEs to fulfill or to seek waiver of bonding requirements.

(Describe efforts)

🞎 This project does not involve bonding requirements.

1. 🞎 Bidder/Offeror did/did not attend the pre-bid/proposal conference
2. 🞎 No pre-bid/proposal conference was held.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bidder/Offeror Name Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address Title

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Date

**Exhibit A – Example Scope of Work**

*Delete before sending to vendors!*

**2. Scope of Work**

XXXXXXXX seeks a Vendor to lead a 6-8 week project to document and deliver a PMO methodology based on PMI standards, to include a core set of processes, templates and checklists to ensure structure and consistency throughout a project’s lifecycle. The methodology will act as a guide for XXXXXXX Project and Program Managers and must be customizable to accommodate different types of projects and initiatives. The overall goal of the methodology is to assist Project and Program Managers with delivering projects faster while having strategies in place to handle problems or unique situations should they arise during a project’s lifecycle. The PMO methodology will include Projects, Programs and Portfolio Management.

**3. Description of Work/Deliverables**

The XXXXXX requires the awarded firm perform the following services:

**3.1 Activities**

1. Assess XXXXXX’s maturity regarding methodologies (project management, program management, portfolio management) and provide recommendations.
2. Provide recommendations on creating a Project Management Center of Excellence.
3. Create an implementation plan based on those recommendations.
4. Manage the delivery of the methodology and any associated deliverables as a project, to include developing and maintaining an implementation plan that will address:
5. The creation of the processes
6. The creation of any supporting documentation such as templates or checklists
7. Recommendation for storage of active and closed project documentation
8. Adoption plan for the new methodology
9. Communication strategy and training
10. Maintenance of the methodology
11. Develop/Enhance Methodology (process/tools/templates) for project management, program management and portfolio management. For project management, there are four types of projects:
12. Agile
13. Waterfall
14. Small Projects
15. Non-IT projects
16. Recommend and develop effective tracking and monitoring processes.
17. Develop Project, program and portfolio metrics/dashboards**.**
18. Ensure the methodology and core set of processes addresses the following needs throughout a project’s lifecycle, from start-up to close down, with the ability to:
19. Easily produce and maintain a project milestone chart of all active projects
20. Monitor time, cost and quality
21. Manage change and scope
22. Minimize risks and issues
23. Manage resource planning and utilization
24. Manage matrixed teams and vendors
25. Identify/report project dependencies
26. Produce portfolio dashboards easily

**3.2 Approach**

1. Lead the project management methodology project in a transparent and productive way, applying standard project management practices.
2. Conduct periodic reviews with the AVP of the PMO to ensure processes and deliverables are in alignment with overall goals and provide weekly status reports to the AVP of the PMO.
3. Maintain an accurate and up-to-date implementation plan and project schedule.
4. Create and conduct presentations and knowledge transfer sessions with the PMO staff members or other stakeholders as requested.

**3.3 Deliverables**

1. Assessment of XXXXXX’s maturity regarding methodologies (project management, program management, portfolio management) including recommendations for Project Management Center of Excellence.
2. Implementation plan based on the assessment.
3. Process/tools/templates for project management (4 types), program management and portfolio management.
4. Effective tracking and monitoring processes.
5. Project, program and portfolio metrics/dashboards**.**

All documents, diagrams, materials provided by XXXXXX in connection with this engagement are the sole and exclusive property of XXXXXX and are proprietary and confidential to XXXXXX. All documents, diagrams, and other material provided by XXXXXX must be returned to XXXXXX at the conclusion of this agreement.

All Deliverables are considered to be “Works for Hire” and will be the sole and exclusive property of XXXXXX and will be proprietary and confidential to XXXXXX.

**Required Schedule of the Work/Deliverables**

XXXXXX is seeking a 6-8 week project and request the project to start the beginning of May and complete by DATE. **Due to the funding available for this project, the Work must be completed by DATE.**

Consultants are expected to be on site Monday through Friday, 8 am to 5 pm. Consultants will provide their own laptops. XXXXXX will provide access to appropriate applications as necessary.

The XXXXXX will provide feedback (acceptance or rejection) on deliverables within 5 business days. The successful Vendor will have 5 business days to correct any deficiencies in the deliverables. (This is a modification for this TORP to Section 6 of the Master Agreement.)