



*Information Technology (IT)
Assets Discovery by
Automated Inventory*

Prepared February 16, 2012

R E Q U E S T F O R Q U O T A T I O N

State Term Schedule

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INTRODUCTION AND BACKGROUND

PURPOSE OF THE REQUEST FOR QUOTATION

Please consider this as the State of Ohio, Department of Administration, and Office of Information Technology (OIT) Request for Quotation for the following project:

Information Technology (IT) Assets Discovery by Automated Inventory Collection

The State of Ohio's Chief Information Officer (CIO) and Chief Operating Officer (COO), Information Services Division (ISD) of the Department of Administrative Services (DAS) request an independent, objective assessment of the current status of the state of Ohio information technology and telecommunication infrastructure, operating environment and applications as it is presently configured. The project will begin within two weeks of the purchase order date. **The project must be completed by the timeline specifications provided in the proposal.**

BACKGROUND

The DAS Office of Information Technology (OIT) delivers statewide information technology and telecommunication services to state government agencies, boards and commissions, as well as policy and standards development, lifecycle investment planning and privacy and security management.

The assessment will entail an objective review of the 28 Cabinet agencies technical environments and all telecommunications networks. The assessment will involve an automated inventory, survey, study, and analysis of the above-mentioned entities' information technology and telecommunication resources including, but not limited to hardware, infrastructure software, networks and any other infrastructure.

The goal of the assessment is to accomplish the following:

Review of the state's current information technology and telecommunication (ITC) environments, including but not limited to:

- An inventory (automated collection) of all ITC infrastructures and capabilities and environments (whether owned, licensed, leased or rented, purchased, and/or custom-built) to include:
 - Hardware (including but not limited to computers, servers, storage (all tiers and types), peripherals, printers, networks, circuits, telecommunications equipment, switches, routers); the State recognizes that given the age of some equipment, particularly specific telecommunications gear, automated discovery may not be possible. The State will be responsible for reconciling any such instances;
 - Software (including but not limited to utilities, middleware, systems software, system management software, development environments, websites, and portals);

- Facilities (including but not limited to buildings, data centers, back-up and recovery facilities). Specifically, we are interested in locations, not facility size or any other attributes.
- This inventory is to be collected and cataloged in industry standard nomenclature and housed in an industry standard database. Bidder must sufficiently detail nomenclature and database layout to be considered for award.

Statement of Work (SOW)

The final report (Inventory Report) shall include, at a minimum, the following:

- A complete inventory of the aforementioned assets, grouped with like to like (meaning by linked infrastructure i.e. server to storage, switch, etc., and by individual entity...all storage fully mapped so you have a comprehensive look by infrastructure element), by Agency and by location within an Agency, noting any items that were not captured or completely detailed.
- Each asset shall be described comprehensively as to its physical attributes (bidder must describe exactly what they can capture and describe) and current operating performance, including electrical and heat profiles. As an example, a server would be listed by manufacturer, model number, firmware level if appropriate, # and type of CPUs and CPU utilization at time of inventory (noting time of day, day of week), memory and utilization, storage attributes and utilization, etc., consuming xxx watts of electricity and producing xxx BTUs of heat. Additionally, each asset must have its purpose or use defined, comprehensive list of software (infrastructure, utility, etc.) and its associated detail (release level and current patch level etc.). If a virtualized asset, a virtual to physical map must be provided. Also note whether the item supports production, test, and development, backup, if possible.
- An assessment of the potential optimum performance (noting current vs. proposed future state), based on manufacturer performance benchmarks and awardees' recommendation against said benchmark if they could recommend improvements beyond manufacturer's stated performance indicators.
- Final inventory is complete when the scan results of the 28 Cabinet Agencies are delivered and collected data, in industry standard nomenclature and catalogued as specified is put into an industry standard database.
- Outline the refresh effort and cost to conduct and reconcile a final report (Inventory Report) on an annual basis.

There are two spreadsheets, one for "Server Band" and one for "Detailed Server Inventory" that are provided as a reference only and not part of the RFQ requirements. These two spreadsheets delineating both a summary and detail schedule of servers, by Agency, to assist in preparing the cost estimates. The spreadsheets are a fair representation of the server infrastructure and are meant to be a guide for bidders but should not be construed as 100% correct in every detail.

Each vendor responding to this solicitation must produce the deliverables set for the IT Assets Discovery by Automated Inventory Collection projects as identified.

Note that fixed cost quotes are to be included for each deliverable. Cost data should be provided showing expected effort hours and STS-approved rates for each deliverable.

Project One – Comprehensive Inventory Report as a result of the automated collection for all DAS infrastructure based on the work effort described above.

Project Two – Inventory Report for the remaining 27 Cabinet Agencies based on the work effort described above.

Project One results should substantiate bidder’s capability and affirm their cost estimated and will be used as a determinant if or when Project Two will begin. The State reserves the right to not move forward with Project Two.

Deliverable #	Deliverable Name	Deliverable Description	Cost of Each Deliverable	Deliverable Timeline
1	Project One Progress Report	Documentation for time and materials based status report.		
2	Project One Implementation Plan	Documents high level work effort description and estimates, schedule, resource needs, key milestones, dependencies, and infrastructure impacts for each on a deliverable based on a number of people and costs. To be more specific, the time required to setup the scan tool on State infrastructure, to scan and collect the requisite information for all DAS infrastructure, the catalog of collected information, in industry standard nomenclature, and insertion into the industry standard database. * Travel is at		
3	Project One Inventory Report	Documents a complete inventory of the aforementioned assets, grouped with like to like, by Agency and by location within an Agency. Lists each asset and its physical attributes, and operation performance, cataloged appropriately using industry standard terms and housed in the industry standard database.		
4	Project Two Progress Report	Documentation for time and materials based status Report.		
5	Project Two Implementation Plan	Documents high level work effort description and estimates, schedule, resource needs key milestones, dependencies, and infrastructure impacts for each on a deliverable based on number of people , and infrastructure impacts for each on a deliverable based on number of people and tool costs. To be specific, the same information that was provided as an estimate for DAS (excepting the scan tool setup) must be detailed for each of the 27 Cabinet Agencies. *Travel is at the expense of consultant.		

6	Project Two Inventory Report	Documents a complete inventory of the aforementioned assets, grouped with like to like, by Agency and by location within an Agency. Lists each asset and its physical attributes, operating performance cataloged appropriately using industry standard terms and housed in the industry standard		
7	Project Three Inventory Report	Provide the cost for updating and refreshing the captured inventory on an annual basis.		

ADMINISTRATIVE

PROPOSAL INQUIRIES

Vendors may make inquiries regarding this RFQ any time during the inquiry period listed on the RFQ cover sheet. The State may not respond to any improperly formatted inquiries. The State will try to respond to all inquiries within 24 hours, excluding weekends and State holidays. The State will not respond to any inquiries received after 8:00 am on the inquiry period end date. The State may extend the proposal due date.

To make an inquiry, vendors must use the process outlined below.

- Access the State Procurement Web site at <http://procure.ohio.gov/>.
- From the Navigation Bar on the left, select “Find It Fast”.
- Select “Doc/Bid/Schedule #” as the Type.
- Enter the RFQ number found on the first page of this RFQ (the RFQ number begins with “DAS”).
- Click the “Find It Fast” button.
- On the document information page, click the “Submit Inquiry” button.
- On the document inquiry page, complete the required “Personal Information” section by providing:
 - First and last name of the prospective vendor’s representative who is responsible for the inquiry;
 - Name of the prospective vendor;
 - Representative’s business phone number, and
 - Representative’s e-mail address.
- Type the inquiry in the space provided, including:
 - A reference to the relevant part of this RFQ;
 - The heading for the provision under question, and
 - The page number of the RFQ where the provision can be found.
 - Click the “Submit” button.

A vendor submitting an inquiry will receive an immediate acknowledgement that the State has received the inquiry as well as an e-mail acknowledging receipt. The vendor will not receive a personalized response to the question nor notification when the State has answered the question.

Vendors may view inquiries and responses on the State’s Procurement Web site by using the “Find It Fast” feature described above and by clicking the “View Q & A” button on the document information page.

All questions must be submitted by 8:00 am on February 23, 2012. Questions submitted after this time will not receive a response from the state.

DUE DATES

All quotations are due by 1:00 pm, EST, on March 7, 2012. Any quotation received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late quotations will not be evaluated for award.

SCHEDULE OF EVENTS

All times listed is Eastern Standard Time (EST).

Event	Date
1. RFQ Distribution to Vendors	February 16, 2012
2. Questions from Vendors due	8:00 a.m., February 23, 2012
3. Responses to Vendors due	4:00 p.m., February 23, 2012
4. Proposal/Quotation Due Date	1:00 p.m., March 7, 2012
5. Target Date for Review of Proposal/Quotation	March 9, 2012 – March 23, 2012
6. Interviews of Candidates, if needed	March 26, 2012 – March 30, 2012
7. Anticipated decision and selection of Vendor	April 2, 2012
8. Anticipated commencement date of work	After Purchase Order

VALUATION FACTORS FOR AWARD

EVALUATION

The following will be considered in determining the vendor to be selected for this engagement, according to a standardized scoring methodology:

- Relevant experience
- Relevant skill level
- Proposed contractor rate(s)

Weight	Criteria
35%	An assessment of the Vendor's ability to deliver the stated deliverables in accordance with the specifications set out in this RFQ.
15%	The extent to which Vendor's proposed approach fulfills State of Ohio's stated deliverables as set out in this RFQ and the time to complete the inventory benchmark.
20%	The Vendor's stability, experiences, and record of past performance in delivering such services.
30%	Best Overall Cost.
100%	

- Comprehensive nature of the discovery and assessment of the Information Technology Assets. Clearly the more information described in the Implementation Plan that can be gathered through the use of the automated process, accurately, eliminating the requirement for additional surveys and Agency site visits is a key outcome and criteria for winning this piece of work. **35%**
- Time to complete the comprehensive inventory is a key benchmark for award. **15%**
- Past experience and references in successfully completing similar engagements. References must include a newly acquired account, one that has at least one year of experience using the proposed tool and one (if the tool is at least 2 years old) a reference that has used the tool for 2 or more years. If the tool is very new (less than 2 years in the marketplace), than the longest using customer must be part of the three references. **20%**
- Cost for the entire endeavor is a major component of evaluation. Cost must be projected in the following manner:
 - Project One – Cost and Time to setup and validate the tool's performance and accuracy using DAS as the benchmark.
 - Project Two - Cost estimates for the remaining 27 Cabinet Agencies, detailing all the staff resources and their cost. Numbers of servers for each Agency is attached to provide a basis for your cost estimate. Please detail the formula used to derive the cost estimates inclusive of the other technologies.
 - Project Three – Included in this cost is the bidder's estimate to update and refresh the captured inventory on an annual basis. This cost to assemble the data in a useable manner for state analysis. **30%**

Vendor must specify all state requirements for this project as part of the response for this bid.

While not meant to be comprehensive, requirements may include:

- Any state infrastructure required to run the automated inventory tool and associated storage to house the captured information. The tool must be installed on state infrastructure.
- All ports and any other security related access requirements necessary for the success of this project. These open port (s) access requirements will be vetted by state security staff, on an Agency by Agency basis, prior to any award insuring there will not be a navigation issue once the project commences.
- Vendor must supply representation of reports, by element that the system will generate as a result of the inventory.
Physical access by location. Physical access and engagement with Agency staff should be minimized or avoided if at all possible.

TERM AND CONTRACT

The contract will be through State Term Schedule (STS) contracts and must reflect or be lower than STS rates, and must use STS categories.

STATUS REPORTING

The contractor will provide weekly status reports to the State OIT. The contractor will be responsible for meeting all timelines designated by assigned Project manager. Payment for services will be based on deliverable completion subject to the State's approval of each deliverable. The State will review deliverables and provide feedback or approval for each deliverable within 5 business days of receipt of deliverable.

NON-DISCLOSURE AGREEMENT

Both candidate and company will be required to sign a non-disclosure agreement which prevents disclosure of any data obtained while on the engagement which can be used to personally identify any parties at any time either during or after the engagement.

GUIDELINES FOR QUOTATION PREPARATION

QUOTATION SUBMITTAL

Each Vendor must submit three (3) complete, sealed and signed copies of its quotation and each quotation must be clearly marked "Automated Inventory" on the outside of its envelope along with Vendors name.

A single electronic copy of the complete quotation must also be submitted with the printed quotations. Electronic submissions should be on a CD, DVD or USB memory stick.

Each proposal must be organized in the same format as described below. Any material deviation from the format outlined below may result in a rejection of the non-conforming proposal. Each proposal must contain an identifiable tab sheet preceding each section of the proposal. Quote should be good for a minimum of 45 days.

- Cover Letter (include phone and e-mail contact)
- State Term Schedule Number
- STS Labor Category Code
- Vendor Information:
 - Vendor References (3 minimum) - form
 - Vendor Resume
 - Additional Vendor Information (optional) – vendor form
- Vendor Hourly Rate
- Cost of Deliverables
 - Project one
 - Project two
- Deliverable Timeline
 - Project one
 - Project two
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance
- W-9 Form

The State will not be liable for any costs incurred by any offeror in responding to this RFQ, even if the State does not award a contract through this process. The State may decide not to award a contract at the State’s discretion. The State may reject late quotations regardless of the cause for the delay. The State may also reject any quotation that it believes is not in its interest to accept and may decide not to do business with any of the Vendors responding to this RFQ.

Quotations MUST be submitted to the State’s Procurement Representative:

Ms. Nychola Richardson, MAS1
30 East Broad Street, 39th Floor
Columbus, OH 43215

PROPRIETARY INFORMATION

All quotations and other material submitted will become the property of the State and may be returned only at the State's option. Proprietary information should not be included in a quotation or supporting materials because the State will have the right to use any materials or ideas submitted in any quotation without compensation to the Vendor. Additionally, all quotations will be open to the public after the contract has been awarded.

The State may reject any Proposal if the Vendor takes exception to the terms and conditions of this RFQ.

WAIVER OF DEFECTS

The State has the right to waive any defects in any quotation or in the submission process followed by a Vendor. But the State will only do so if it believes that is in the State's interest and will not cause any material unfairness to other Vendors.

REJECTION OF QUOTATIONS

The State may reject any quotation that is not in the required format, does not address all the requirements of this RFQ, or that the State believes is excessive in price or otherwise not in its interest to consider or to accept. The State will reject any Non-STS responses. In addition, the State may cancel this RFQ, reject all the quotations, and seek to do the work through a new RFQ or other means.

EVALUATION OF QUOTATIONS

Clarifications and Corrections

During the evaluation process, the State may request clarifications from any Vendor under active consideration. It also may give any Vendor the opportunity to correct defects in its quotation. But the State will allow corrections only if they do not result in an unfair advantage for the Vendor and it is in the State's best interest.

Requirements

This RFQ asks for responses and submissions from Vendors. While each criterion represents only a part of the total basis for a decision to award the contract to a Vendor, a failure by a Vendor to make a required submission or meet a requirement will normally result in a rejection of that Vendor's quotation. The value assigned to each criterion is only a value used to determine which quotation is the most advantageous to the State in relation to the other quotations that the State received. It is not a basis for determining the importance of meeting any requirement to participate in the quotation process.

The evaluation process may consist of up to three distinct phases:

1. The procurement representative's initial review of all quotations for defects;
2. The evaluation committee's evaluation of the quotations; and
3. Interviews (optional).

Initial Review

The procurement representative normally will reject any incomplete or incorrectly formatted quotation, though the procurement representative may elect to waive any defects or allow a Vendor to submit a correction. If a late quotation is rejected, the procurement representative will not open or evaluate the late quotations. The procurement representative will forward all timely, complete, and properly formatted quotations to an evaluation committee, which the procurement representative will chair.

Committee Review of the Quotations

The State's review committee will evaluate and numerically score each quotation that the procurement representative has forwarded to it.

The evaluation will result in a point total being calculated for each quotation. Those Vendors submitting the highest-rated quotations may be scheduled for the next phase. The number of quotations forwarded to the next phase will be within the committee's discretion, but

regardless of the number of quotations selected for the next phase, they will always be the highest rated quotations from this phase.

At any time during this phase, the State may ask a Vendor to correct, revise, or clarify any portions of its quotation.

The State will document all major decisions in writing and make these a part of the file along with the evaluation results for each quotation considered.

Once the technical merits of a quotation are considered, the costs of that quotation will be considered. But the State may also consider costs before evaluating the technical merits of the quotations by doing an initial review of costs to determine if any quotations should be rejected because of excessive cost. And the State may reconsider the excessiveness of any quotation's cost at any time in the evaluation process.

Interviews

The State may record any presentations, demonstrations and interviews.

Determination of Responsibility

The State may review the highest-ranking Vendors or its key team members to ensure that the Vendor is responsible. The Contract may not be awarded to a Vendor that is determined to be not responsible. The State's determination of a Vendor's responsibility may include the following factors: the Vendor's and its key team members' experience, past conduct on previous Contracts, past performance on previous Contracts, ability to execute this contract properly and management skill. The State will make such determination of responsibility based on the Vendor's quotation, reference evaluations and any other information the State requests or determines to be relevant.

Changing Candidates

The major criterion on which the State bases the award of the contract is the quality of the Vendor's candidate(s). Changing personnel after the award may be a basis for termination of the contract.

Contract Award Process

It is OIT's intention to award one contract under the scope of this RFQ and as based on the RFQ Calendar of Events schedule, so long as OIT determines that doing so is in the State's best interests and OIT has not otherwise changed the award date. Any award decision by OIT under this RFQ is final. After OIT makes its decision under this RFQ, all Proposers will be notified in writing of the final evaluation and determination as to their proposals.

OIT anticipates making one award depending on program needs and the fit of the Proposer to the scope of this RFQ.

ATTACHMENT ONE

VENDOR PROFILE SUMMARY

VENDOR REFERENCES

Vendor's Name:

References. Provide three references for which the proposed candidate has successfully demonstrated meeting the requirements of the RFQ on projects of similar size and scope in the past five years. The name of the person to be contacted, phone number, company, address, brief description of project size and complexity, and date (month and year) of employment must be given for each reference. These references must be able to attest to the candidate's specific qualifications.

The reference given should be a person within the client's organization and not a co-worker or a contact within the offerors organization.

If less than three references are provided, the offeror must explain why. The State may disqualify the Proposal if fewer than three references are given.

Client Company:	Client Contact Name:	Client Contact Title:	
Client Address:		Client Contact Phone Number:	
Project Name:	Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year	
Description of services provided that are in line with those to be provided as part of this Project:			
Description of how client project size and complexity are similar to this project:			

**ATTACHMENT ONE VENDOR
PROFILE SUMMARY VENDOR
REFERENCES CONTINUED**

Client Company:	Client Contact Name:	Client Contact Title:	
Client Address:		Client Contact Phone Number:	
Project Name:	Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year	
<p>Description of services provided that are in line with those to be provided as part of this Project:</p> <p>Description of how client project size and complexity are similar to this project:</p>			

Client Company:	Client Contact Name:	Client Contact Title:	
Client Address:		Client Contact Phone Number:	
Project Name:	Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year	

Description of services provided that are in line with those to be provided as part of this Project:

Description of how client project size and complexity are similar to this project: