



State of Ohio
Desktop Virtualization Pilot

Prepared February 24, 2010

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

Minority Business Enterprise (MBE) Set Aside

State Term Schedule

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INTRODUCTION AND BACKGROUND

PURPOSE OF THE REQUEST FOR QUOTATION

The purpose of this engagement is to assist The State of Ohio's Office of Information Technology (OIT) virtual desktop pilot by assessing, planning a comprehensive architectural design, identifying use cases and piloting the rollout of the VMware View™ service in a hosted service environment. This service takes elements from a foundational VMware Infrastructure architecture and extends and adapts the design to support the hosting of virtual desktop workloads for various agencies throughout the State of Ohio.

The plan and design service begins with discovery and exploration into the State's future-state service model, use-cases, and provides best practices as well as in-depth implementation guidance and information about installation and configuration tasks, day to day operations, and design verification tasks.

This engagement covers the following areas:

- 1) Assessment of the current environment
- 2) View™ Plan/Design – Architecture for desktop environment (virtualized)
- 3) Identification of use cases
- 4) Pilot rollout – partial implementation to leverage and refine architecture
- 5) TCO/ROI – Define TCO/ROI model for cost justifying enterprise-wide View™ rollout
- 6) Go-forward implementation plan

The State of Ohio, Office of Information Technology is seeking to identify and select an outside independent organization with MBE certification and State Term Schedule to perform the activities listed above. The remainder of this document provides additional information that will allow a service provider to understand the scope of the effort and develop a quotation in the format desired by the State of Ohio.

The engagement is anticipated to commence March 22, 2010 and must be completed, including having the virtualization infrastructure, including network configuration, in place no later than June 30, 2010.

ADMINISTRATIVE

TECHNICAL AND CONTRACTUAL CONTACT

Any questions concerning technical specifications, Statement of Work (SOW) requirements, or quotation format must be directed to:

Name	Matthew Held
Email	matt.held@oit.ohio.gov

All questions must be submitted via email and must have "Virtual Desktop RFQ" in the subject line.

DUE DATES

All quotations are due by 1:00 pm, Eastern March 3, 2010. 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 are Eastern Standard Time

Event	Date
1. RFQ Distribution to Vendors	February 23, 2010
3. Questions from Vendors about scope or approach due	12:00 Noon, February 25, 2010
4. Responses to Vendors about scope or approach due	5:00 p.m., February 26, 2010
5. Quotation Due Date	1:00 p.m., March 3, 2010
6. Target Date for Review of Quotations	March 8, 2010
7. Final Vendor Selection Discussion(s)--Week of	March 8, 2010
8. Anticipated decision and selection of Vendor(s) – Week of	March 8, 2010
9. Anticipated commencement date of work	March 22, 2010

GUIDELINES FOR QUOTATION PREPARATION

QUOTATION SUBMISSION

Award of the contract resulting from this RFQ will be based upon the most responsive Vendor whose offer will be the most advantageous to the State of Ohio in terms of cost, functionality, and other factors as specified elsewhere in this RFQ.

The State of Ohio reserves the right to:

- Reject any or all offers and discontinue this RFQ process without obligation or liability to any potential Vendor,
- Accept other than the lowest priced offer,
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers, and
- Award more than one contract.

Vendor's quotation shall be submitted in several parts as set forth below. The Vendor will confine its submission to those matters sufficient to define its quotation and to provide an adequate basis for State of Ohio's evaluation of the Vendor's quotation.

In order to address the needs of this procurement, State of Ohio encourages Vendors to work cooperatively in presenting integrated solutions. Vendor team arrangements may be desirable to enable the companies involved to complement each other's unique capabilities, while offering the best combination of performance, cost, and delivery for the Desktop Virtualization Pilot Project being provided under this RFQ. State of Ohio will recognize the integrity and validity of Vendor team arrangements provided that:

- The arrangements are identified and relationships are fully disclosed, **and**
- A prime Vendor is designated that will be fully responsible for all contract performance.

Vendor's quotation in response to this RFQ will be incorporated into the final agreement between State of Ohio and the selected Vendor(s). The submitted quotations are suggested to include each of the following sections:

1. Cover Letter
2. Executive Summary
3. Approach and Methodology
4. Project Deliverables
5. Project Management Approach
6. Detailed and Itemized Pricing tied directly to STS pricing and categories (In a separately sealed envelope)
7. MBE or EDGE Certification
8. State Term Schedule Certification
9. Conflict of Interest Statement
10. Payment Address
11. Appendix: References
12. Appendix: Project Team Staffing
13. Appendix: Company Overview

DETAILED RESPONSE REQUIREMENTS

EXECUTIVE SUMMARY

1. Executive Summary

This section will present a high-level synopsis of the Vendor's responses to the RFQ. The Executive Summary should be a brief overview of the engagement, and should identify the main features and benefits of the proposed work.

SCOPE, APPROACH, AND METHODOLOGY

2. Scope of Work

This scope of work defines the project phases, technical design scope and document deliverables.

The activities for this engagement are organized in phases as follows:

1. Planning and Pre-Engagement Preparation
2. Engagement Kickoff
3. Design Enablement Knowledge Transfer Workshop
4. Requirements Gathering Activities
5. View™ Assessment and TCO/ROI
6. Detailed Design Sessions and The State Deliverables Creation (View™ and VI)
7. Presentation of The State's Deliverables
8. Project Wrap-Up with Identification of Next Steps
9. Build and Rollout of in scope View™ Infrastructure and in scope Desktop Provisioning

2.1 Project Tasks

2.1.1 Planning and Pre-Engagement Preparation

The Vendor will conduct a pre-engagement planning call with The State to initiate the project. Topics to be discussed include but not limited to:

- Project timelines and scheduling
- Identification of key State project team members with whom the Vendor will work to accomplish the tasks defined in this SOW
- Identification of any required hardware; software, networking, and security that The State needs to provide in order to successfully complete this engagement (see Section 2.2). These systems are required to accomplish activities including, but not limited to, understanding the current desktop environment, and the installation of the environment used in the design enablement knowledge transfer sessions.
- Review of Customer's responses to the View™ Readiness Questionnaire.

2.1.2 Engagement Kickoff

The Vendor's engagement team leads State project sponsors and stakeholders in an engagement kickoff meeting to set expectations about the purpose of the engagement, the delivery approach and timelines, the amount of time and effort required from the participants, and the expected milestones and deliverables. The objectives of the meeting are focused on:

- Introduction of the delivery team, roles, and responsibilities
- Project goals and purpose of engagement
- Explanation of the expected engagement deliverables and work products
- Confirmation that a virtual environment that meets the technical requirements listed in Section 2.2.9 is available for the next phase.
- Establish how much of the data requested in the View™ Readiness Questionnaire is available, and how much still needs to be collected

2.1.3 Design Enablement Knowledge Transfer Workshop

The design enablement knowledge transfer workshop is scheduled to start immediately after the on-site kickoff meeting, and consists of a combined VMware Infrastructure and VMware View™ workshop. The objectives of the workshop are as follows:

- Provide an understanding of virtualization fundamentals, facilitate discussions and provoke thought
- Install and configure a live demonstration environment to be used for both hands-on product demonstration and collection of bandwidth data requested in the View™ Readiness Questionnaire (if not already provided)
- Offer an opportunity to grasp concepts that may be difficult to mentally conceptualize or fully comprehend without visual aids or examples

After the workshop concludes, the Vendor will discuss, define, and schedule the subsequent detailed design and requirements gathering sessions. The workshop will consist of 20 to 30 participants.

2.1.4 Requirements Gathering

This phase is focused on understanding The State project requirements. During this phase, the Vendor:

- Schedules and chairs a series of open forum-style question and answer sessions with key project stakeholders and subject matter experts—these interview sessions can sometimes also serve as small-scale design workshops
- Identifies as many business, technical and operational requirements, constraints and potential solutions as possible
- Works to balance The State project requirements with VMware best practices as outlined at <http://www.VMware.com>.

Usually, two stakeholder interview sessions are required for each of the designated project stakeholder or subject matter expert groups. However, sometimes more may be needed.

Business and technical sponsors required are:

- Relevant Department Heads
- End User Desktop Services
- Desktop OS Provisioning
- Server Operations -Virtual Infrastructure
- Server Operations -Active Directory
- Application Deployment and Management Teams
- Application Subject Matter Experts
- Help Desk – End User Support
- Network Operations
- Storage Management and Provisioning Team
- Data Integrity (Backup and Restore)
- Business Continuity and Disaster Recovery Team
- Monitoring and Operations
- Security Team

The Vendor will then process the collected data and prepare it for use in creating an appropriate VMware View™ architecture and design to support OIT requirements as identified by this engagement.

2.1.5 View™ Assessment and TCO/ROI

As part of their cost savings and operational agility strategies, OIT is planning to leverage VMware View™ technology. As a first phase of this effort, OIT has asked the Vendor to perform an assessment and prepare a corresponding TCO/ROI model that will identify the cost savings for both direct and indirect costs as a result of leveraging VMware View™ .

The results of this desktop assessment will provide OIT with (subject to availability of information):

- Desktop device inventory
- Application inventory
- End-user desktop resource utilization
 - Networking usage
 - Storage usage
 - Application usage, frequency, peaks
- Identification of use cases
- TCO/ROI

To successfully conduct this assessment, the Vendor will require access to:

- Key OIT desktop stakeholders
- The financial cost structures, asset allocations and infrastructure and operational expense metrics as necessary to complete the ROI analysis.

In order to inventory the in-scope desktops, the Vendor may leverage a desktop inventory tool. This tool must be licensed by OIT via a State Term Schedule such that in-scope desktops can be assessed.

This engagement is expected to be conducted with both on-site interviews and remote conference calls for information discovery and analysis.

The Vendor will conduct a final presentation summarizing the findings and recommendations made during the View™ Assessment and TCO/ROI engagement. At this point, deliverables created will be presented for review, comment and final signoffs.

Deliverables include:

- Executive Level Presentation of Recommended Virtual Desktop Implementation (VDI) Strategy & ROI

2.1.6 Detailed Design Sessions and State's Deliverables Creation

During this phase, group and individual design sessions are conducted as needed to develop the design and supporting documentation. The Vendor works to:

- Conduct detailed design sessions with key project stakeholders, functional groups and subject matter experts as necessary
- Draft the architecture design, taking into account all project requirements and VMware best practices
- Create draft versions of all document deliverables. During this process, The State involvement is frequently required to provide feedback and verification, and avoid any surprises when final deliverables are presented

As the Vendor creates the deliverables, some work may be done individually and off-site, using data gathered from interviews and previous design sessions, as well as collaboratively with The State participants.

2.1.7 Presentation of the State's Deliverables

The objectives of this phase are to present final engagement deliverables and secure formal signoff. Tasks include:

- Scheduling and chairing an onsite meeting with subject matter experts, key stakeholders, and the project sponsor to present and explain each deliverable
- Addressing any final modifications required to the engagement deliverables
- Obtaining formal sign-off from the project sponsor

2.1.8 Project Wrap-Up with Identification of Next Steps

- Conduct the project wrap-up presentation, highlighting the challenges encountered and successes achieved during the project
- Discuss appropriate next steps for Customer, including a clear and assertive set of recommendations to move forward

2.2 Technical Design Scope

This scope of work includes plan and design efforts for each of the following technical areas.

2.2.1 Desktop Use Case

This SOW defines a desktop use case as a collection of grouped end-users and end-user requirements so similar in nature that a single virtual machine image and its collective application set can be used seamlessly by any end-user who conforms to the use case.

For example, the virtualization of Call Center desktops represents a group of end-users whose computing activities during an average business day are so similar as to require similar computing performance and application capabilities. This could be referred to as the Call Center use case.

The Vendor will provide design services necessary for an environment to support the following:

1. Standard Knowledge Worker (Standard Desktop), to be defined as an employee whose job is performed using Office, various thin applications to access their information, but who do not do any development or administration of those applications.
2. Application Developers
3. Engineers
4. Mobile Workers who use a laptop and may not have network access, or who may require 2-factor authentication.
5. Remote users (Pandemic)
6. Vendors running View™ on non-State machines.

The Vendor will also provide recommendations for user profiles based upon best practices.

2.2.2 Server Environment

This section details the scope of design efforts related to the server environment. These values represent a maximum scope of effort for the design exercises.

Attribute Specification Rationale

VMware View™ redundancy for this project is limited to functionality provided via VMware View™ replica servers. Vendor will assist the State in all design and testing efforts related to network redundancy and load balancing.

Attribute	Rationale
vCenter	Indicates the number of vCenter servers and related virtual environments to be included in the design process. Today these are known to be vCenter servers located in main datacenter.
View™ Connection Broker	Total number of connection broker servers to be included in the design.
View™ Security Server	Total number of security servers to be included in the design
View™ Server Redundancy	This design includes the creation of redundant VMware View™ connection servers via the specification of View™ replica servers.

2.2.3 Client Access Devices

Client access devices that can be used in conjunction with this design are:

- Thin client devices that are listed in the current Thin Client Compatibility Guide for VMware Virtual Desktop Manager (available from the VMware website)
- Traditional PCs (new or repurposed) that meet the requirements for running the VMware View™ Client for Windows® as defined in VMware View™ Manager Administration Guide
- Laptop PCs

The following State client-access devices will be used.

Client ID	Client Type
Thin Client 1	TBD
Desktop	Existing Inventory
Laptop	Existing Inventory

Local device redirection includes the functionality of simple USB devices only. Local devices that are deemed by the Vendor's design team as "complex, non-standard devices" may not be included in the design.

Any third party software or tools required to test printing functionality will be specified by the Vendor, but must be purchased by the State.

2.2.4 Network Infrastructure

Design efforts will include virtual desktop access via LAN and WAN connectivity, and will include the design of fully redundant links wherever required by the project requirements. Designs will be developed for the following State connectivity scenarios.

Desktop Use Case	Description
SOCC desktop	
Rhodes Tower	Floors 39, 40, 27, 28, 7 and 18
Surface Road	
Chase Building	
Integrity Drive	
Remote User	Pandemic response (home), Inter-Agency

An assessment and gap analysis of the current network infrastructure will be performed and recommendations will be made to bridge the gap between current infrastructure and what is needed to achieve the desired end-user experience. The assessment should examine, but not limit itself to, such things as network throughput, latency, redundancy, topology, and storage to support 1,000 users.

2.2.5 Server and Storage Infrastructure

Storage architecture design will include the following State storage devices as follows.

Storage Type	Location and Purpose
To be determined by the Vendor and State infrastructure team.	TBD

2.2.6 Application Virtualization

A complete application inventory of the pilot desktops will be made and will include an assessment of both the applications and the usage base and a test strategy for the assessed applications. Well-documented process and procedures, including a recommendation of tools, will be provided to the State for the purpose of future assessments.

In addition to predetermined applications, the following applications will be included in the design and testing for ThinApp application virtualization.

1. Omnicom
2. Personnel Disability Administration System

2.2.7 Virtual Desktop Environment

Design efforts include the creation of the following virtual machine templates and profiles

Use Case	OS	Notes:
Standard Desktop Win-XP	Windows XP	Includes: Office 07 as part of the standard desktop
Standard Desktop Win-07	Windows 7	Includes: Office 07 as part of the standard desktop

2.2.8 Directory Services

Design efforts will include interoperation of the following domains within Customer's existing Active Directory environment. The following domains will be included.

1. DAS
2. EM (ODNNT)
3. ES
4. OAKS
5. MARCS

2.2.9 Virtual Infrastructure Requirements

The State is required to provide a VMware Infrastructure that is capable of supporting installation of a demonstration VMware View™ environment for purposes of knowledge transfer.

Requirements are listed in the following tables and have been extrapolated from the VMware View™ Reference Architecture (available from

<http://www.vmware.com/resources/techresources/1084>).

The VMware Infrastructure environment to be used with the design enablement workshop should provide the following resources.

Attribute	Specification
Desktop ESX Resources	The ESX host should provide a minimum of 2 2.66GHZ CPUs and 4GB of RAM.
Desktop Server Memory	Each virtual desktop instance used in the pilot will be provisioned with 1 GB of RAM. This should provide a sufficient amount of free memory for use by each desktop.
Network Interface Cards (NIC)	1 Gigabit (or faster) NIC connected to the appropriate LAN network
ESX Version	4.0 U1 (or vSphere, depending on support)
vCenter Server	Access to a vCenter Server. vCenter must be a minimum build of 4.0 U1.

The storage architecture for virtual desktops should be provided via traditional Fibre Channel storage or iSCSI to deliver adequate performance, and should be configured as follows.

Attribute	Rationale
LUNs per ESX/ESXi host	64 virtual machines per ESX/ESXi host, and 64 linked clone delta disk files per LUN
LUN Size	Recommendation on LUN size based upon use cases
LUN RAID	Estimated average of 320 IOPS and 7,360 Kbps
Hosts per LUN	All ESX/ESXi hosts in the cluster must be zoned to share allstorage to enable VMware DRS load balancing and VMwareHA failover

2.2.10 Virtualized Desktop Support Recommendations based on Best Practices

The Vendor will provide the State with recommendations based on best practices for achieving optimum Virtualized Desktop Support. The recommendations will address:

1. Tools for supporting the virtualized desktop environment.
2. Support practices, including help desk.
3. Operating systems (both virtual and local) for:
 - a. Windows XP
 - b. Windows 7
4. Peripherals
5. Security considerations, including but not limited to:
 - a. Local PC lockdown
 - b. 2-factor authentication
 - c. Virus protection
6. Guidance for license management best practices for such applications as:
 - a. Microsoft Visio
 - b. Microsoft Project
 - c. Microsoft OS Licensing (VECD and VECD for SA)

2.2.11 Virtual Desktop Implementation Road Map

To enhance the State's success in extending desktop virtualization, the Vendor will provide a list of recommendations and a project schedule to map the transition from Pilot to Implementation. This roadmap is intended to assist OIT and Information Technology Services (ITS) in extending desktop virtualization to the rest of the Department of Administrative Services.

2.3 Pilot Build and Implementation

The build phase will result in the construction of the environment as prescribed in the design section of this engagement and will result in the provisioning of 100 virtual machines. Additionally, measurement criteria will be established and a pilot team identified in order to track the success of this rollout.

2.3.1 Identification of Measurable Success Criteria

This phase uses will identify measurements by which the pilot outcome will be judged: baselines, pilot success criteria and the test scenarios. The Vendor and the Customer's project team will identify appropriate users to include in the pilot.

Part One: Baselines, Success Criteria, and Test Cases

- Identify and document baseline measurement requirements
- Identify and document project and technical success criteria
- Define in measurable terms what The State deems a successful pilot rollout
- Define and document measurable test cases to validate success criteria

Part Two: User Recruitment, Selection, and Survey Design (State and Vendor Task)

- Discuss end user suitability for pilot environment
- Classify end user population and identify candidates for inclusion

2.3.2 Environment Build, Pilot, and Rollout

The build and rollout will result in establishing a virtual desktop environment prescribed by the design documents. The delivering Vendor will work to:

- Build and deliver a sound and well-documented environment
 - Configuration of ESX host servers to accommodate virtual desktops in scope
 - Broker implementation
 - Provisioning of initial pool of virtual desktops for pilot testing
- Test the environment according to the operational verification plan
- Document any and all changes once the environment is built and the pilot usage begins, especially changes in configuration items relating to the performance and behavior of the system
- Establish the gold master to be utilized as the reference configuration for rollout
- Continue provisioning of desktops in manageable increments until target number achieved
- Application level testing will be the responsibility of Customer

2.3.3 User Acceptance Testing

End-users participate in pilot User Acceptance Testing (UAT) by performing their daily job responsibilities, executing test scripts, promptly reporting issues and filling out surveys. There are two distinct UAT phases known as Phase One UAT and Phase Two UAT.

2.3.3.1 Phase 1 UAT

During this phase, the following will occur:

- Administer surveys and analyze survey responses
- Conduct regular, ongoing dialog with pilot users
- Monitor the Help Desk to identify and triage pilot infrastructure issues

There will be a short session after Phase 1 UAT to assess lessons learned, review issues identified, and review changes made and proposed to the environment. Before increasing the number of pilot users, the survey results are reviewed to ascertain whether the system is meeting user expectations.

2.3.3.2 Phase 2 UAT

The primary function of Phase UAT is to expand the Pilot base, and to continue to monitor system performance. During this phase, the following will occur:

- Administer surveys and analyze survey responses
- Conduct regular, ongoing dialog with pilot users
- Monitor the Help Desk to identify and triage pilot infrastructure issues

There will be a short session after Phase 2 UAT to assess lessons learned, review issues identified, and review changes made. The Vendor will propose changes to the environment that will need to be made to extend the system to support 1,000 users.

2.3.4 Project Wrap-Up, Findings and Recommendation

To wrap up the pilot, the delivering Vendor provides:

- A thorough analysis of the pilot process
- Well-prepared conclusions based on pilot data
- A clear and assertive set of recommendations to move forward

The findings and recommendations are presented in a detailed written report and an executive presentation.

2.3.5 View™ Assessment and TCO/ROI (refine existing model or create)

As part of their cost savings and operational agility strategies, OIT is planning to leverage VMware View™ technology. This assessment and TCO/ROI model will identify the cost savings for both direct and indirect costs as a result of leveraging VMware View™.

The results of this desktop assessment will provide OIT with (subject to availability of information):

- Desktop device inventory
- Application inventory
- End-user desktop resource utilization
 - Networking usage
 - Storage usage
 - Application usage, frequency, peaks
- Identification of use cases
- TCO/ROI Tools with process and procedures such that another agency within the State could perform an independent assessment.

To successfully conduct this assessment, the Vendor will require access to key OIT desktop stakeholders. The Vendor retained for this engagement will also require access to the financial cost structures, asset allocations and infrastructure and operational expense metrics as necessary to complete the ROI analysis.

In order to inventory the in scope desktops, the Vendor will leverage a desktop inventory tool. This tool will be licensed by OIT such that in scope desktops can be assessed.

This engagement is expected to be conducted with both on-site interviews and remote conference calls for information discovery and analysis.

The Vendor will conduct a final presentation summarizing the findings and recommendations made during the View™ Assessment and TCO/ROI engagement. At this point, deliverables created will be presented for review, comment and final signoffs.

Deliverables include:

- Executive Level Presentation of Recommended VDI Strategy & TCO/ROI Assessment Report
- Delivery of the Final Draft of the VDI Strategy & ROI Assessment Report
- TCO/ROI Tools with process and procedures

DELIVERABLES

During the course of this engagement, the Vendor project team will create and deliver to The State the following deliverables:

- View™ Architecture Design – A design blueprint that describes the design to the level of detail necessary to begin planning the implementation. It can also used (and reused) to create a working infrastructure in the future.
- View™ Design Implementation Roadmap – Detailed implementation instructions containing an ordered list of procedures to implement and test the architecture design using engagement deliverables and reference documentation.
- View™ Installation and Configuration Guidelines – Document providing high-level guidance on how to leverage existing reference documents to install and configure the individual products that make up the design.
- View™ Operational Verification – A document containing procedures that can be executed post-installation to verify expected operation of individual infrastructure components. Additionally, it can be used at any point in the future to verify that that infrastructure continues to function correctly.
- View™ Operations Procedures – Runbook-style document of customer-specific operational procedures featuring step-by-step instructions and accompanying screenshots.
- View™ Pilot Requirements and Use Case Specifications – These define the functional and nonfunctional requirements of the View™ platform and its intended use.
- View™ Pilot Success Criteria and Test Specifications – These describe the success criteria for the pilot engagement in quantifiable terms, and the testing to be conducted to obtain quantifiable results.
- Pilot Prototype Build document – Documentation for the View™ desktop infrastructure build.
- View™ Pilot Execution Plan – A document describing the pilot activities and the associated execution plan in detail.
- View™ Pilot Findings Report – A high-level presentation detailing the pilot outcome, lessons learned and recommended next steps for adoption.
- Operational View™ Pilot Environment – An operational virtual desktop environment, based off the design recommendations from this engagement. Virtual desktops will be provisioned as noted.

- Project Management Documentation – A project plan, project schedule, project workbook and project status are the minimal documentation provided. Other documentation needed to support the project management function will be included as needed.
- Executive-level presentation of Recommended Virtual Desktop Implementation (VDI) Strategy and TCO/ROI analysis.
- TCO/ROI Tools with process and procedures – Concise documentation to enable another agency within the State to perform an independent assessment within their agency.

PROPOSED TEAM

The contract company will assemble a delivery team consisting of the contract company's personnel or authorized agents. At minimum, the proposed team must consist of the following roles:

- **Project Manager (Qty:1)** – Working with the Project Success Center's (PSC) assigned project manager under the direction of the Customer's project sponsor; the Project Manager is responsible for managing the scope, schedule, workflow and acceptance for each phase of the project while maintaining ongoing status communications including meeting minutes, weekly status reports and demonstration results. The Project Manager is responsible for the completion and delivery of all required documentation and paperwork related to the project. The Project Manager is responsible for Identifying, tracking, managing and resolving project issues; proactively disseminating project information to all stakeholders; identifying, managing and mitigating project risk; ensuring that the solution is of acceptable quality; proactively managing scope to ensure that only what was agreed to is delivered, unless changes are approved through scope management; defining and collecting metrics to give a sense for how the project is progressing and whether the deliverables produced are acceptable; managing the overall schedule to ensure work is assigned and completed on time and within budget; developing and managing to the Project Plan; planning the schedule in-line with the solution; managing the project stakeholders; managing the project team; managing the project risk; managing the project schedule; managing the project budget; managing the project conflicts; participates on the Project Management Team with the Performance Engineering Team (PET) Lead and PSC Project Manager to make project and technical decisions based on the direction set by the CIO, Deputy CIO, and COO.
- **Desktop Virtualization Senior Consultant (Qty:1)** - The Senior Consultant is responsible for delivering the Desktop Virtualization using VMware® View™ technical solution. The Senior Consultant delivers the design and documentation, and installs, configures and tests the virtualization components. The Senior Consultant also transfers knowledge about the installed components and helps create processes to support the solution.

PROJECT MANAGEMENT APPROACH

Include the method and approach used to manage the overall project and client correspondence. Describe how the engagement proceeds from beginning to end. Provide a rough-estimate timeline that clearly identifies deliverable milestones.

DETAILED AND ITEMIZED PRICING

All pricing associated with the quote for this service must be broken down by person, role, effort estimate duration and pricing. All pricing must refer to the State Term Schedule (STS) categories for pricing. Please indicate, by STS number, the STS schedule being referenced.

APPENDIX: REFERENCES

Provide three current corporate or governmental references for which you have performed similar work.

APPENDIX: PROJECT TEAM STAFFING

Include biographies and relevant experience of key staff and management personnel. Describe the qualifications and relevant experience of the people that would be assigned to this project by providing biographies for those staff members. Please indicate the role that each person is being proposed to fill. Describe bonding process and coverage levels of employees. Affirm that no employees working on the engagement have ever been convicted of a felony.

APPENDIX: COMPANY OVERVIEW

Provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary SIC numbers, address, main telephone number, toll-free numbers, and facsimile numbers.
- Key contact name, title, address (if different from above address), direct telephone and fax numbers.
- Person authorized to contractually bind the organization for any quotation against this RFQ.
- Brief history, including year established and number of years your company has been offering Information Security Testing.
- Provide STS number.

EVALUATION FACTORS FOR AWARD

CRITERIA

Any award to be made pursuant to this RFQ will be based upon the quotation with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon the Vendor's responsiveness to the RFQ and the total price quoted for all items covered by the RFQ.

The following elements will be the primary considerations in evaluating all submitted quotations and in the selection of a Vendor or Vendors:

Weight	Criteria
25%	An assessment of the Vendor's ability to deliver the indicated service in accordance with the specifications set out in this RFQ.
20%	Availability of sufficient high quality Vendor personnel with the required skills and experience for the specific approach proposed.
15%	The Vendor's stability, experiences, and record of past performance in delivering such services.
10%	The extent to which Vendor's proposed solution fulfills State of Ohio's stated requirements as set out in this RFQ.
5%	Completion of all required responses in the correct format.
25%	Overall cost of Vendor's quotation.*

* **The cost information MUST be signed, and submitted in a separately sealed envelope.** The envelope must be clearly marked "OIT Desktop Virtualization Pilot Project Cost" on the outside of its envelope along with Vendor's name.

State of Ohio may, at their discretion and without explanation to the prospective Vendors, at any time choose to discontinue this RFQ without obligation to such prospective Vendors.

TERM AND CONTRACT

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

The term will be until June 30, 2010.

Only qualified EDGE / MBE Vendors are invited to participate.

QUOTATION SUBMITTAL

(1) Each Vendor must submit Seven (7) complete, sealed and signed copies of its quotation(excluding cost information), and each quotation must be clearly marked "OIT Desktop Virtualization Pilot Project" on the outside of its envelope along with Vendors name.

(2) **The cost information MUST be signed, and submitted in a SEPARATELY SEALED ENVELOPE.** The envelope must be clearly marked "OIT Desktop Virtualization Pilot Project Cost" on the outside of its envelope along with Vendor's name.

(3) 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. **The electronic copy MUST be submitted in a SEPARATELY SEALED ENVELOPE.**

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:

Mr. Ted Hampton, Fiscal Officer
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 submissions from non-MBE certified Vendors. 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 GENERALLY

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.

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.

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 be according to the criteria contained in Part One of the RFQ.

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.

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.

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.