

**REQUEST FOR QUOTATIONS  
MINORITY BUSINESS ENTERPRISE (MBE)  
SET ASIDE**

DATE ISSUED: May 5, 2010

Procurement Opportunity Document #: OITRFQ010

The State of Ohio, through the Department of Administrative Services (DAS), Office of Information Technology (OIT), Infrastructure Services Division (ISD) is requesting proposals for (1) supervisor/project manager contractor and Subject Matter Experts to assist the Office of Information Technology with delivering an Exchange 2010 Design and Specification (EDS).

INQUIRY PERIOD BEGINS:	Wednesday, May 5, 2010
INQUIRY PERIOD ENDS:	Friday, May 7, 2010
OPENING DATE:	Friday, May 14, 2010
OPENING LOCATION:	Department of Administrative Services Office of Information Technology Infrastructure Services Division 1320 Arthur E. Adams Drive, 1 <sup>st</sup> Floor Columbus, OH 43221)

This RFQ consists of the following Parts and Attachments, totaling 13 consecutively numbered pages. Please verify that you have a complete copy.

**PARTS**

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## OVERVIEW

### Administrative:

The Department of Administrative Services (DAS), Office of Information Technology (OIT), Infrastructure Service Division's (ISD), is issuing a Request for Quote (RFQ) for a qualified MBE/EDGE firm to perform a validation / verification of the planned design and architecture for the Exchange 2010 messaging environment.

This Time and Materials Contract (Contract) will be valid from award until June 30, 2010. All work must be completed and accepted by the State of Ohio by June 30, 2010. The selected firm will be precluded from responding to the procurement of specified hardware and software identified through this assignment.

**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.

**OIT Infrastructure Service (ISD)** provides information technology services, infrastructure (both hardware and software) platform hosting and management as well as guidance to state agencies in order to promote the secure and effective use of information technology.

### Technical:

OIT provides a Microsoft Exchange service that is available to any state agency, board or commission. This service includes e-mail, calendaring, task and contact management as well as many additional features including faxing, virus and spam scanning, mail list services, mobile connectivity options, etc. The service is currently supporting over 14,000 users from a wide variety of agencies, boards and commissions. Customers include DAS, DRC, RSC, OBM, the Governor's Office, SPBR, and the Ethics Commission and many other boards and commissions. This existing service includes the following features:

- A robust Exchange 2007 environment capable of supporting over 20,000+ mailboxes
- 300MB base mailbox storage limit with additional levels available
  - 600 MB mailbox limit
  - 900 MB mailbox limit
  - 1,200 MB mailbox limit
- Outlook Web Access & RPC over HTTP access
- Multiple anti-virus products
- SPAM prevention services
- Inbound / Outbound faxing capability
- Blackberry and Windows Mobile connectivity support
- List Server service
- Management, product upgrades and Tier 2 Help Desk Services
- All hardware provided and updated
- An optional e-mail archiving service utilizing the Symantec Enterprise Vault product that includes a legal discovery component. There is an additional cost for this service option.
- Zix Encryption Gateway – enables customers to encrypt messages to addressees outside of the OIT e-mail system.

### Objective:

## Engagement Objectives/SOW

The State seeks a firm to perform a validation / verification of the planned design and architecture for the Exchange 2010 messaging environment. This design will identify the necessary specifications that meet the requirements described below.

The Exchange 2010 architected environment will maximize the increased functionality of Exchange 2010 and take advantage of virtualization, the Microsoft Best Practices and other optimization techniques. The architected solution will support the migration and ongoing operations for approximately 60,000 users. A percentage of these users will be on premise (in OIT's physical environment) and a percentage of mobile users will be considered in a "Cloud" environment. The proposed Exchange 2010 environment must be:

- Scalable and capable of supporting a statewide e-mail environment of 36,000 to 40,000 (approximately 60%) premise based e-mail users
- Administration and management of 20,000 to 24,000 (approximately 40%) mobile or "cloud" based e-mail users
- Connectivity to, at a minimum, twenty-three (23) State of Ohio agencies
- Provide 24 X 7 X 365 access and support
- Provide High availability
- Disaster Recovery (DR) / Business Continuance (BC) / Continuity of Operations (COOP) options

OIT's objective will be to take these deliverables and put the plans into immediate effect. In the deliverables, the firm should be specific in recommending any enablement steps and / or tools that will facilitate the aforementioned objectives. This will include the design, architecture and associated specifications for procurement of the Exchange 2010 environment.

## Deliverables

The following components should be included in the project deliverables<sup>1</sup>:

- Assessment
  - Review and assessment the current OIT messaging environment (Exchange 2007) measured against industry standards and Microsoft Best Practices (MOF, etc.)
  - GAP analysis between the current and the proposed Exchange 2010 messaging environments
  - Identify components of the existing Exchange environment that can be leveraged in the new Exchange environment
  - Appropriate use of server virtualization (VMware) in Exchange environments
- Design the architecture for an enterprise class Exchange 2010 messaging environment
  - Provide a design document that identifies:
    1. Hardware and associated specifications
    2. Virtualization considerations (VMware in use)
    3. Software and associated specifications
    4. Storage and associated specifications
    5. Networking / bandwidth capabilities and requirements
    6. Management and Administrative tool sets
    7. Help Desk support processes

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<sup>1</sup> **NOTE:** These are representative deliverables, and not meant to be all inclusive. We expect the firm to identify and describe deliverables that ensure an effective solution design. Simply providing the list of Representative Deliverable Components will not be considered responsive in either the proposal or the successful performance of the project engagement.

8. Staffing and training
  9. High availability options
  10. Security considerations (on premise and cloud solution)
  11. Authentication considerations
  12. eDiscovery planning and considerations
  13. DR / BC / COOP options
  14. Other requirements discovered through this assignment
  15. Recommendations based upon current industry standards and Microsoft Best Practices
- Leverage the existing Exchange 2007 infrastructure components (hardware, software, storage, networking, etc.), where possible, for the scaled build out of the Exchange 2010 infrastructure while maintaining continuity of operations.
  - Develop management options for utilizing Cloud Computing services as an opportunity for the State of Ohio based upon industry standards and best practices. This includes the management, administration and support of “cloud” based users.
  - Provide recommendations for utilization of server virtualization, where appropriate, using VMware, to achieve the necessary performance and operational levels of service based upon industry standards and Microsoft Best Practices
- Provide an Implementation document that provides
    1. Transformation requirements
    2. Migration requirements
    3. Repeatable process for migration in the form of a schedule from the two environments
  - Identify best practices, tools, technologies, resource and other components required for a successful Exchange 2010 messaging implementation.

**General Administrative:**

The vendor representative will report to the designated OIT/ISD lead for assignments on this time and materials award. Space will be provided in OIT’s offices at 1320 Arthur E. Adams Drive, Columbus, Ohio. Actual time spent onsite will depend on the project schedule, tasks, associated activities and the vendor’s proposal, however it is anticipated that a percentage of the work effort will be conducted at the **vendor** facility. The length of this assignment is expected to be two to four weeks and all work must be completed by June 30, 2010. OIT/ISD anticipates selection of a Minority Business Enterprise (MBE) vendor that provides the best overall value and enters into a time and materials arrangement for these services. It is anticipated that the successful bidder will propose a team consisting of one person to be assigned as a lead and be able to leverage subject matter experts (SME) as required to execute the contract.

**The State wishes to receive proposals from certified Ohio Minority Business Enterprises (MBEs)/EDGE firms only, through State Term Schedule (STS) contract, as this RFQ is set aside for MBE competition pursuant to Revised Code section 125.081.**

**Program Governance Structure:**

Program Sponsor  
Leadership Team

Stu Davis, ISD Deputy Director  
George Hess, Unified Network Administrator  
Lane Wood, Enterprise Shared Services (ESS) Administrator  
Glen Coleman, Enterprise Architect

Rick Dowell, Consolidated Help Desk Manager  
Bill Ticknor, Open Systems Services Manager  
Brant Thomas, Exchange Supervisor  
Ken Gapsch, Project Manager

### General Qualifications

In order for the selected firm and its proposed candidates for this position to be successful, it is important that they have relevant, successful experience in similar settings (public sector, new service concept definition and launch). In your proposal, specify company background information / history, list experience with the state of Ohio, list experience with public sector, provide overview of the areas the company specializes in (primary related to the scope of this effort) and how the company plans to support the candidates on this engagement.

The firm must have a valid STS contract (or need to partner with a company that has a valid STS and propose through them) and current MBE certification.

### Approach to Project

The firm should supply the State with a description of their approach to the project. This can be of any length, but should be specific enough to demonstrate that the firm and its project team have a clear understanding of and method to achieve the project objectives. The approach will be given strong consideration in the evaluation and scoring of the proposals.

The firm should supply a time-phased schedule of work, at a high level. This schedule will be refined with the State upon project initiation.

### Assumptions

- OIT expects the project to take between two to four (2 - 4) weeks. This will be validated and changed if necessary by the State while working with the selected firm very soon upon project initiation.
- The engagement team or selected members may be extended further for additional work. The firm will be given a minimum of two (2) weeks' notice of the intended extension by the State.
- The availability of the State Leadership Team and other State participants will be a constraining factor, as each person will be performing their regular full-time responsibility. The firm should anticipate this and plan to staff the project with flexibility and with consultant(s) that can adapt and be efficient in this scenario. Advanced scheduling of activities and adherence to this schedule will be key to gaining access to the leadership team.
- OIT expects the firm to propose the staffing that best meets the objective of the project, and leave it to the Firm's discretion and experience to propose the appropriate staffing and any roll-on / roll-off scheduling. Any roll-on / roll-off assumptions should be specified, reflected in the hours estimate, and will be validated and changed at project initiation by the State and the firm.

## PART ONE: POSITION REQUIREMENTS

### Specific Company and Candidate Qualifications:

- Experience with developing an assessment of an Exchange 2007 messaging environment.
  1. Preferred: Candidates with direct experience and knowledge of the state of Ohio's federated model and OIT's roles and responsibilities in the state of Ohio.
  2. Desired: Candidates with direct knowledge of the state of Ohio's federated model and OIT's roles and responsibilities in the state of Ohio.
  3. Acceptable: Candidates with experience and knowledge of the public sector operating under a federated model.

- Experience in designing the architecture of messaging systems with particular emphasis on scalable, enterprise class Exchange 2010 environment with certifications on Exchange 2003 - 2010.

NOTE: The State is seeking a consultant to help design the architecture, not necessarily to lead the State through the building and migration from Exchange 2007.

1. Preferred: Candidates with this experience in designing the architecture Exchange 2010 within the public sector at the Federal or State level for information technology organizations for an organization of similar size or larger.
  2. Desired: Candidates with this experience in designing the architecture Exchange 2010 for information technology organizations for an organization of similar size.
  3. Acceptable: Candidates with this experience in designing the architecture Exchange 2010 for an organization of similar size.
- Experience in developing a high-level implementation plan from Exchange 2007 to Exchange 2010 and certifications on Exchange 2003 - 2010.
    1. Preferred: Candidates with training and experience managing an Exchange 2010 implementation plan for the public sector.
    2. Desired: Candidates with training and experience developing an Exchange 2010 implementation plan for the public sector.
    3. Acceptable: Candidates with training in an Exchange 2010 implementation.

#### Project Schedule

RFQ Available for Distribution	May 5, 2010
Proposals Due	May 14, 2010
Award (best case)	May 19, 2010
Purchase Order Issued	May 28, 2010
Work Begins	June 1, 2010
Project Completion	June 30, 2010
One Year Option	N/A

#### PART TWO: TERM & CONTRACT

- The contract will be for **Time and Material** through State Term Schedule (STS) contract.
- The term will be until June 30, 2010.
- Only qualified MBE vendors are invited to participate.
- Contractors will complete work on-site, any exceptions must be approved by the OIT/ISD Administrator.
- No additional costs, such as travel, meals, lodging, taxes, parking or other associated costs may be charged separately for this work. The vendor's sole compensation for the duties described herein shall be the billings at the vendor's hourly rate.
- All contractors shall read, acknowledge and follow DAS policies, rules and guidelines.
- All work performed by the vendor shall be deemed a "work-for-hire," and shall be the sole property of the State of Ohio. The vendor may not use such work without written Infrastructure Services Division consent.
- Contractors shall use state provided equipment, any exceptions shall be approved by Infrastructure Services Division.

The vendor, as a component of the project kick-off meeting, will be required to sign any state policy documents that are deemed appropriate by State contracting representatives.

### PART THREE: PROPOSAL FORMAT

The offeror's response shall clearly demonstrate how their proposed candidates meet the requirements outlined in Part One of this RFQ. The Offeror's response must identify the roles and responsibilities of all proposed candidates, and must include a resume for each candidate. Should the contract be awarded, consultant substitutions are permitted only with the approval of Infrastructure Services Division.

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.

- Cover Letter
- Company Profile (history, past & current clients)
- MBE Certification
- State Term Schedule Certification
- Approach to Project
- Candidate Information:
  - Candidate Resumes
  - Candidate References (3 minimum) – see Attachment 1
  - Optional candidate writing sample(s)
  - Candidate Hourly Rate (The offeror's pricing will include citations of all eligible costs from their state term schedule including page number, labor category, and hourly rate.)

The offeror shall not include any terms and conditions that add to, take away from, or conflict with their existing state term schedule. NO EXCEPTION WILL BE MADE TO THIS PROVISION.

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.

#### **Proposal Submittal Instructions:**

Please reply to Ted Hampton, Business Office Lead for Office of Information Technology Proposals, (30 East Broad Street, 39<sup>st</sup> floor, Columbus, OH 43215) with a written proposal no later than 1:00 pm on Friday, May 14, 2010.

Please submit proposals in both electronic and hard copy form. Each offeror must submit three (3) complete and signed hard copies of its proposal, and each proposal must be clearly marked "**Infrastructure Services Division Proposed Contractors.**" The State will reject late proposals regardless of the cause for the delay. The State may also reject any proposal that it believes is not in its interest to accept and may decide not to do business with any of the offerors responding to this RFQ.

**Revised Code Section 9.24 prohibits the State from awarding a Contract to any offeror (s) against whom the Auditor of State has issued a finding for recovery if the finding for recovery is "unresolved" at the time of award. By submitting a proposal, the offeror warrants that it is not now, and will not become subject to an "unresolved" finding for recovery under Section 9.24, prior to the award of a Contract arising out of this RFQ, without notifying DAS of such finding.**

All proposals 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 proposal or supporting materials because the State will have the right to use any materials or ideas submitted in any proposal without compensation to the offeror. Additionally, all proposals will be open to the public after the contract has been awarded.

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

**Clarifications:**

Please submit any questions for clarifications to Ted Hampton via E-Mail at (Ted.Hampton@oit.ohio.gov) by 12:00 p.m. May 7, 2010. All questions will be replied to by E-Mail, to all prospective firms, by 8:00 a.m. May 10, 2010. Phone calls will not be accepted.

**Waiver of Defects**

The State has the right to waive any defects in any proposal or in the submission process followed by an offeror. 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 offerors.

**PART FOUR: EVALUATIONS**

- The following will be considered in determining the firm to be selected for this engagement, according to a standardized scoring methodology:
  - Relevant experience of proposed team members
  - Certifications on Microsoft Exchange 2003 - 2010
  - Firm's approach
  - Relevant skills level of proposed team members
  - Company profile (history, financial stability)
  - MBE and EDGE certified firms
  - Proposed total cost
- The consultant will not be permitted to substitute personnel for those submitted for RFQ evaluation (during the RFQ evaluation or at project initiation), except when a candidate's unavailability is no fault of the consultant (e.g., candidate is no longer employed by the consultant, is deceased, etc.). NOTE: If a substitution situation occurs, the proposal will be re-evaluated. If the substitution gives the consultant an unfair advantage, the proposal may be eliminated or the other firms will also be given the chance to substitute process start over.
- All proposals will be evaluated for meeting the requested information. Incomplete proposals will not be reviewed. The proposals that provided the requested information will be evaluated for at least the highest prioritized candidate. The proposals will be scored based on the criteria requested above.
- The top candidates (2-4) may be interviewed and scored to determine the most qualified candidates. Candidate substitutions between the proposal evaluation and interview periods are highly discouraged (see above). If OIT has other qualified candidates, the consultant's proposal requesting a substitution will be denied at this stage and the proposal would be eliminated from evaluation. If OIT does not have enough qualified candidates due to the substitution, all received proposals will be asked to confirm their candidates, given a couple of days to provide replacements and the entire process will start over.

In general, the offeror that provides the best value will be selected. The following evaluation criteria will be referenced in order to determine the best value:

The State will evaluate and numerically score each proposal. The evaluation will be according to the criteria contained in Parts One and Four of the RFQ. The vendor must site specific examples of past performance in the areas to be evaluated. Discussions of general engineering and documentation capability may not score in the "Meets" category. The evaluation and subsequent scoring will result in a point total being calculated for each proposal. Those offerors submitting the highest-rated proposals may be scheduled for the next phase. The number of proposals forwarded to the next phase will be within the committee's discretion, but regardless of the number of proposals selected for the next phase, they will always be the highest rated proposals from the initial evaluation phase. At any time during the initial evaluation phase, the State may ask an offeror to correct, revise, or clarify any portion of its proposal.

Once the technical merits of a proposal are considered, the costs of that proposal will be considered. But the State may also consider costs before evaluating the technical merits of the proposals by doing an initial review of costs to determine if any proposals should be rejected because of excessive cost.

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

### Interviews

The State may require top-ranking candidates to interview with the State. Such interviews provide the State an opportunity to test and probe the professionalism, qualifications, skills and work knowledge of the top ranking candidates. Interviews will be conducted at the sole discretion of the state.

The interviews for each work area will be structured around standard sets of oral and written questions. The same sets of questions will be used for all candidates for each area. The interviews will be scheduled at the discretion of the State and will be held at OIT, 1320 Arthur E. Adams Drive, Columbus, OH 43221. At its own expense, the offeror must make its candidate(s) available on-site within five working days following the State's notification. All interview questions will be evaluated using zero (0) for does not meet, two (2) for meets and four (4) for exceeds.

The contractor will not be permitted to substitute personnel for those submitted for RFQ evaluation (during the RFQ evaluation or at project start-up), except when a candidate's unavailability is no fault of the contractor (e.g., Candidate is no longer employed by the Contractor, is deceased, etc.). Note: If a substitution situation occurs the proposal will be re-evaluated. If the substitution gives the contractor an unfair advantage, the proposal may be eliminated or the other vendors will also be given the chance to substitute and the process must start over.

### Please Provide:

1. State Term Schedule contract number
2. Company information:
  - a. Company background information
  - b. Contact information
  - c. Indicate if EDGE or MBE certified
3. Statement of Work. (The firm's approach to the project)
4. Proposed (Initial) Time Phased Schedule of Work. This will be refined with the State upon project initiation.
5. Specify the candidate's rates (at or below the STS contracted rate).

NOTE: due to the state of Ohio revenue shortfalls, all STS firms have been asked to provide at least a **15 percent discount** on their contracted rates.

Example: Provide a table similar to the one below to show the estimated hours, hourly rate, and extended fee for the project. We would expect to validate and adjust those hours in initial discussions on approach with the selected firm.

Candidate Name /Position	Project State/Timeframe	Rate	Estimated Hours	Extended Rate
1.		\$xx.xx/hr		\$xx,xxx
2.				
3.				

NOTE: This is a **Time and Materials** contract.

**PART FIVE: PROPOSAL INQUIRIES**

Offerors 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 12:00 p.m. on the inquiry period end date. The State may extend the proposal due date.

To make an inquiry, offerors 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 “OIT”).
- 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 offeror’s representative who is responsible for the inquiry;
  - Name of the prospective offeror;
  - 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.

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

Offerors 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.

**PART SIX: ACCOUNT AND BILLING REQUIREMENTS**

Account Information: The Offeror shall provide the following information with their response:

- Business Name and Address
- Business Owner or Principle responsible for the agreement
- Contact Phone
- Contact e-mail address
- Federal Tax ID Number, with a completed form W-9 if requested
- State Term Schedule Number

Billing Requirements: All invoices to the Ohio Office of Information Technology shall be:

- No less than monthly, or after deliverable(s) have been approved by Client.
- Submitted within 10 business days following Client approval of services performed.
- Include the following:

- a. Description of service provided for the invoice period
  - b. Deliverable(s) completed with Client acceptance
  - c. If hourly based, project time sheets signed by employee(s) with Client approval
  - d. Company Name
  - e. Purchase Order Number
  - f. Remittance Information
  - g. Date of Invoice, and date(s) services were performed
- Submit invoice(s) to:
    - State of Ohio
    - Ohio Office of Information Technology – Business Office
    - 30 East Broad Street, 39<sup>th</sup> Floor
    - Columbus, OH 43215-3414

**ATTACHMENT ONE  
PERSONNEL PROFILE SUMMARY  
CANDIDATE REFERENCES**

<b>Candidate's Name:</b>
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**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 less than three references are given.

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

