



The University of Marietta

**Request for Proposal
Issued: May 03, 2013**

**Virtualization
For
Server Infrastructure**

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GENERAL INFORMATION

1) Original RFP Document

The University of Marietta shall retain the RFP and all related terms and conditions, exhibits and other attachments, in original form in an archival copy. Any modification of these, in the vendor's submission, is grounds for immediate disqualification.

2) About the Organization

The University of Marietta is a four-year University that resides within the University System of Georgia. The college, founded in 1975, is a newer institution that prides itself on its education and use of information technology. In the fall semester of 2012 there were 6,202 students enrolled in programs at the University of Marietta. The purpose of the business is based on a comprehensive goal of enhancing information technology in the University including virtualization solutions, which enables a reduction of information technology costs while increasing the efficiency, utilization, and flexibility of existing assets.

3) Confidentiality Statement

The University of Marietta will attempt to keep all proposals confidential. The material contained in the successful proposal will be incorporated in a contract and information that is considered sensitive as well as proprietary shall be identified as such by the proponent. Confidential technical and commercial information exists within the University of Marietta a contract. According to the Protection of Privacy and Freedom of Information Act it is deemed inappropriate for this information to be released.

4) Terms and Conditions

i) Sub-Contracting

- (1) Using a Sub-contractor (who must be clearly identified in the Proposal) is acceptable. This includes a joint submission by two proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful interconnection of the two product or service lines and this must be defined in the Proposal.
- (2) A Sub-contractor's firm or individual, whose current or past corporate or other interests may, in the University's opinion, give rise to a conflict of interest in connection with this project will not be permitted. This includes, but is not limited to any firm or individual involved in the preparation of this proposal.

ii) Liability for errors

- (1) Due to the University of Marietta's considerable efforts to ensure an accurate representation of information in this RFP, information that is contained in this

RFP is supplied exclusively as a guideline for contractors. The information is not guaranteed or warranted to be accurate by Marietta University, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve contractors from forming their own opinions and conclusions with respect to the matters addressed in this RFP.

iii) Terms of Agreement

- (1) According to proposal submission guidelines the contractor agrees to all the terms and conditions of this RFP, contractors who have obtained the RFP electronically must not alter any portion of the document, with the exception of adding the information requested. To do so will invalidate the proposal.

iv) Using of request for proposal

- (1) This RFP, or any portion thereof, may not be used for any purpose other than the submission of proposals.

v) Response Submission

- i. Responses to this bid solicitation must be submitted and delivered to the University of Marietta as “sealed bids” no later than by 11:00 a.m. EST on Friday May 3, 2013 (Final Submission Date). Proposals must include a digital copy on DVD, CD or flash drive. Acceptable formats include RTF or PDF. It is the respondent’s sole responsibility to ensure their responses arrive in a timely manner. The University of Marietta will reject all late arrivals.
- ii. Envelopes containing responses to this bid solicitation shall be so marked “Purchasing Department Building A”. The outside of the envelope shall be identified as follows:

The University of Marietta
Purchasing Department Building A
123 Virtual Lane, Marietta, GA 30060

- iii. Oral, telephone, electronic mail or fax bids shall not be considered, nor will modifications of proposals by such communication be considered. The completed bid response shall be without deletions or alterations. Delivery of the proposals will be considered authorized by the service provider to make a contract in case of awarded.
- iiii. Any questions should be made in writing via e-mail to John Eidson, , jeidson@spsu.edu, Purchasing Manager. All responses to questions, and any clarifications or addendums to this request shall be sent to all requestors and shall be posted on the web at www.univma.edu

vi) Costs Associated with Preparation of the Vendor's Response

- (1) The University of Marietta will not be liable for any cost incurred by the respondents in preparing responses to this bid or negotiations associated with award of a contract.

vii) Omissions

- i. Omissions in the proposal of any provision in this case described shall not be construed as to relieve the vendor of any responsibility or obligation to the complete and satisfactory delivery, operation, and support of any and all equipment or services.

viii) Right to Reject

- i. The University of Marietta reserves the right to accept or reject all proposals or sections thereof and when the rejection is in the best interest of MCS and reserves the right to award without further discussion. The University of Marietta reserves the right to waive minor irregularities of any proposal and to negotiate the terms of any proposal.

5) Contact Information

All enquiries related to this RFP are to be directed to:

John Eidson, Purchasing Manager
Phone: (800) 635-3204
Email: jeidson@spsu.edu

Information obtained from any other source should not be relied upon. Inquiries and responses will be recorded and the University of Marietta may choose to distribute the same to all proponents. Questions will be answered if time permits.

6) Proposal Due Date

Based on the closing date for receiving proposals all RFP's must be received in the Procurement Office by 11:00 a.m. EST on the specified date. To elaborate, proposals must be received in a sealed envelope by 11:00 (Eastern Standard Time) on Friday May 3, 2013, at:

The University of Marietta
Purchasing Department Building A
123 Virtual Lane, Marietta, GA 30060

Proposals must not be sent electronically. Proposals and their envelopes should be clearly marked with the name and address of the proponent and the RFP title.

7) Solicitation and Supplier Agreement

Vendors and their agents will not contact any member of the Department of Information Technology at the University of Marietta regards commission or staff with respect to this RFP, other than the representativeness in section (1.5), at any time prior to the award of a contract or the cancellation of this RFP.

SCOPE OF WORK

1) Introduction

The University of Marietta demands secure, available, reliable, and innovative information technology and systems infrastructures and resources to offer high quality learning environments, increase access to education, manage the business of education, and meet demands of global competition. Consequently, the Department of Information Technology at the University of Marietta requires restructuring of responsibilities, realignment of several key positions, and the addition of some absent skill sets to meet institutional computing requirements.

Marietta University's Information Technology Services (UITS) strives to support learning in a modern world through an IT model that includes:

- i) Information Technology Services and Management
- ii) Cloud computing infrastructures
- iii) Mobile computing and learning
- iv) Academic research on global technology
- v) Unique instruction service delivery

Currently UITS does not have a VMware license in use but possesses the hardware and capabilities to support the addition of virtualization software.

2) Background Information

i) Description of IT Infrastructure

- (1) The IT infrastructure uses a mesh of technologies.
- (2) Databases are Oracle, Windows SQL server and MySQL
- (3) The domain servers are Microsoft Active Directory and are currently functioning at the 2003 level
- (4) Web servers are Apache and Windows IIS
- (5) There is a DMZ for web servers, email, and proxy servers.
- (6) Firewall appliances are placed at the incoming WAN and between the DMZ and internal networks.
- (7) Email server is Zimbra
- (8) Very little of our infrastructure is currently virtualized.
- (9) There is a corporate network for operating the school daily activities and organization. There is a separate network for use by the students and faculty for labs and research.
- (10) Each college is a subdomain of the forest.
- (11) Current server hardware is a mix of HP ProLiant, Dell PowerEdge and IBM x64 rack servers.

- (12) Current network hardware is Dell, Cisco, juniper and HP. We are using fiber at the core to the distribution and Cat53 from the switches' to the clients. Servers are connected to all switches using fiber.
- ii) Business Process Description
- (1) We are a mid-sized university specializing in engineering degrees and technologies. We are part of the state's university system and abide by all laws, rules, and regulations governing universities at this level.
 - (2) Maintenance/Support
 - (a) All day to day maintenance and support is done by internal I.T. staff. There are maintenance agreements with hardware and software vendors that occasionally will upgrade firmware, patches etc.
 - (b) Quality Control/Change Management
 - (3) Technology Management
 - (a) Technology Management for servers utilizes remote desktop. Vsphere is only utilized on 10 servers. Nagios software monitors our services and Splunk monitors our databases servers and DMZ servers for security and anomalies.
 - (4) Product/Service Delivery
 - (5) Student Liaison
 - (a) Our student help desk is the student liaison with IT Tickets are created using remedy to track issues. Technicians are first line support. Second tier is the help desk supervisors and third tier is the data center employees.
 - (6) Accounting management
 - (a) Accounting management software is located in a separate VLAN network and is hosted in the datacenter.
 - (7) Distance Learning.
 - (a) Distance Learning utilizes software not in the University of Marietta's datacenter. The Distance 2 Learn software is hosted in the state university systems datacenter. The Wimba software video recording client is installed on instructor's computers in the classrooms but uploaded to the D2L system.
- iii) Expectations
- (1) We are expecting the selected party to upgrade selected servers and to move our current infrastructure to a 100 percent virtualized state.
 - (2) To implement a VMware system in a timely and cost effective manner that will support the business processes and needs of the students, faculty, and staff.
- iv) Project Budget
- The budget for this project should include the following factors in the breakdown:
- (1) Hardware
 - (2) Software
 - (3) Labor/Personnel Cost
 - (4) Training

(5) Maintenance and Consulting Services

3) Requirements

i) Functional Requirements

(1) Usability requirements

(a) Human factors and ergonomics

(i) Easy and non-stressful for a wide variety of University users

(b) Human computer interaction (HCI)

(i) Reliable and accessible GUI

(2) Security requirements

(a) Limit access to authorized users. A username and password will challenge all users on the internal network for authentication to gain access.

(b) Firewalls. All traffic shall pass through the firewall to enter the internal network. There shall be NO back doors on the network or access routed around the VPN or firewall.

(c) Internet Protocol Security and SSL Virtual Private Network. All external access must use VPN to access services and hardware on the internal network and all traffic shall be encrypted.

(d) All DMZ servers shall be placed between the firewalls of the external WAN and internal networks. Current intrusion detection systems must remain in place operable.

(3) User requirements

(a) The current access to the domain by the employees and students should not change. Active Directory is the authentication method for all users of the organization. Any changes must adhere to the change management process of this document.

(4) All hardware and ESXI 5.1 operating systems must perform to the ability advertised and scoped in the RFP requirements for hardware.

ii) Technical Requirements

(1) No servers shall be connected directly to the DMZ and internal networks with connecting through the firewall and ACLs.

(2) All hardware and ESXI 5.1 operating systems must perform to the ability advertised and scoped in the RFP requirements for hardware.

(3) The datacenter shall remain 100 percent fiber on all LAN connections

(4) No hardware shall host both DMS and internal servers. Hardware must stay in a specific zone.

(5) Research and lab equipment must not be accessible to the DMZ or internal corporate network zones except for connectivity to the proxy server for Internet access.

iii) Hardware Requirements

- (1) Server requirements
 - (a) Hardware must be compatible to a standard server rack. Hardware firewalls must be placed between the external Internet and the DMZ, and between the DMZ and internal networks.
- (2) Storage requirements
 - (a) All storage must be either iSCSI or Fiber channel.
- (3) Network Requirements
 - (a) Routers and switches must be compatible with common routing and switching protocols including EIGRP, RIP2, and spanning-tree.
 - (b) Firewalls must include VPN and allow the use of all common routing protocols
- iv) Financial Requirements
 - (1) A detailed invoice for the following criteria must be included:
 - (a) Hardware
 - (b) Software
 - (c) Labor/Personnel Cost
 - (d) Training
 - (e) Maintenance and Consulting Services
 - (2) Payment Terms
 - (a) Payment schedule will be based on completion of deliverables based on negotiated milestones.
- v) Service Requirements
 - (1) Hardware must have a minimum 3-year service agreement allowing onsite service when requested.
 - (2) Hardware must provide redundant services to provide a 100% 365-day uptime on all services.
 - (3) All hardware must have a minimum 6 years of support before end of life.
- vi) Organizational Requirements
 - (1) Proposal bids should fit reasonably within the confines of Marietta University's business processes and structure. This includes but is not limited to the following:
 - (a) Business processes
 - (b) Policies & Rules
 - (c) Business structure
 - (d) Standards
 - (e) Departments
 - (2) Should a proposal bid include suggested changes to the University of Marietta organization, the procurement team will meet with bidders to evaluate the applicability and acceptance/rejection of the changes.
- vii) Integration Requirements

- (1) Current hardware must allow for 100 percent integration into the virtualized environment. Any hardware not capable must be identified and those services moved to other hardware.
- (2) Any hardware non-compliant or incompatible with VMware ESXI 5.1 must be Identified before the removal, replacement or transfer of any hardware or services in the datacenter

viii) Implementation Requirements

- (1) The datacenter must stay active and up during the complete implementation and server migration into the virtualized environment.
- (2) Any upgrades to existing systems must be done in a way to not remove existing services for more than 5 minutes to complete the migration and alter network connections.

ix) Training and support Requirements

- (1) Assistance. Documentation must be provided showing the infrastructure and providing the rack location, server hardware, services, IP's and name of each Virtual server. Documentation on the backup and restoration of each VM from snapshots, disk backup, and tape backup, including migration to another physical server, must be provided and must be proven in our datacenter.
- (2) Support can be provided by the service vendor and/or the software and hardware vendor but shall be included in the bid.
- (3) Support information of all hardware, software, and services

4) Change Management

- i) Adoption of virtual environment from physical by staff
- ii) Topology changes
- iii) Scheduling

CONTENT OF PROPOSAL

1) Submission

- i) Submission of bids by contractors should include 3 separate copies of the proposal with all of the relevant documents included. The proposals should be submitted and received at the University of Marietta Business Office no later than (insert date, be specific on time and date).
- ii) Proposals should be addressed to:
 - (1) John Eidson, The University of Marietta, Purchasing Department Building A, 123 Virtual Lane, Marietta, GA 30060

2) Proposal Rejection

- i) Proposals submitted after this date and time will be rejected.

3) Associated Costs

- i) Any costs associated with bidding on a proposal are the sole responsibility of the submitting organization.

4) Cover Letter

- i) The cover letter for the RFP package submission should be marked as:
“Organization Name,” RFP #02856:

5) General Qualifications

- i) Each submitting organization should meet the following criteria or the bid will automatically be rejected.
 - (1) Have completed previous virtualization installation and implementation at a University level within the last 5 years
 - (2) Provide a list of at least three (3) references with previous installations of virtualization projects

6) References

- i) Each reference provided should include previous professional projects similar to this RFP and should have been completed within the past 5 years.
- ii) Individual References should include an organization name, phone number, email, and a contact person.

7) Proposed Schedule

- i) RFP submission should/can include a list of dates for activities related to the RFP scope of work.

- ii) Major dates could/should include potential time frames for: project start, date of deployment, installation, training, project completion.

8) Pricing

- i) Proposal submissions should include a breakdown of costs for:
 - (1) Hardware
 - (2) Software
 - (3) Labor/Personnel Cost
 - (4) Training
 - (5) Maintenance and Consulting Services
- ii) Discounts for selected packages/installations

SELECTION CRITERIA

1) Evaluation Criteria

Each proposal will be evaluated based on criteria and priorities as defined by the University of Marietta, which will choose the submission that, taken as a whole, and in the University's sole opinion, is in the best interest of the University. Proposals should address the evaluation criteria itemized below.

The evaluation criteria include:

- i) The overall best pricing for products and services.
- ii) Suitability of proposed product(s) for purpose and best fit of proposed product(s) into existing inventory, environment and support structure.
- iii) Product evaluations based on web resources, discussions with other information technology professionals and direct experience with product when possible.
- iv) The vendor's overall performance record, including responsiveness and reputation based on feedback from available references as well as prior satisfactory experience with the University of Marietta.
- v) The perceived quality of the vendor's response, including completeness, accuracy and appropriateness.
- vi) Stability/risk of vendor, including assessment of risk that they may not be able to fulfill responsibilities and financial strength.
- vii) Understanding of the requirements and the technical concepts defined in the Scope of Work, and Compliance of products/services with the requirements.

2) Procurement Team

- i) The University of Marietta will form the proposal Procurement Team.
- ii) The University of Marietta may replace any members on the team or reconstitute the team in any way the University deems appropriate.
- iii) The Procurement Team will not have a potential conflict of interest to keep the process fair to all competitors. Your awareness of a potential conflict may not arise until you are well into the evaluation process. If there is any question about a potential conflict, notify the Purchasing Manager immediately and consult legal counsel. If a conflict of interest exists, that person will be no longer a member of the team.

3) Evaluation Process Decision

- i) The Procurement Team evaluates each proposal and rates them based on an evaluation-scoring sheet. Compile the resulting evaluations from all team members,

- resolve any factual oversights, make sure the resulting team member notes are legible and produce a summary.
- ii) The Procurement Team evaluates each proposal and makes notes about their observations and tentative rating on an evaluation worksheet. The team then meets as a group to review the individual proposals. The team arrives at a group consensus as to the associated ratings and produces a summary that constitutes the team's recommendation.
- 4) Rating Scale For Use in Evaluation

A rating scale using whole numbers is intended to establish guidelines within that range to ensure members of the RFP Procurement Team perform their evaluation with consistency. The Procurement Team may assign any value for a given criteria from 0 to the maximum number of points. A zero value typically constitutes no response or an inability of the vendor to meet the criterion. In contrast, a three value is the maximum value that constitutes a high standard of meeting the criterion.

RATING SCALE	
VALUE	EXPLANATION
0	Response of no value
1	Limited applicability
2	Some applicability
3	Substantial or total applicability

For Example, if a criterion is receiving a weighting of 15% of the total possible points. Using the equation below, a maximum of 15 points can be awarded:

$$\frac{\text{Assigned Value}}{\text{Maximum Value}} \times \text{Weighting Factor}$$

5) Weighting Factors

According to the section (4.1), the evaluation criteria can be divided into two major factors:

(1) Technical Proposal (30%)

The technical proposal will be evaluated with respect to how well it demonstrates the bidder's capabilities, resources, and experience in performing

work that is consistent with and responsive to the requirements of the Scope of Work. Emphasis will be placed on the following:

- (1) Understanding of the requirements and the technical concepts defined in the Scope of Work, and Compliance of products/services with the requirements (60%)
 - (2) Suitability of proposed product(s) for purpose and best fit of proposed product(s) into existing inventory, environment and support structure (15%)
 - (3) The perceived quality of the vendor's response, including completeness, accuracy and appropriateness (10%)
 - (4) Stability/risk of vendor, including assessment of risk, which they may not be able to fulfill responsibilities, and financial strength (15%)
 - (a) High Risk (low probability of success): Great potential exists for serious work performance problems including, but not limited to, work schedule disruptions, quality problems, and substantial increase in contract costs incurred by the Government.
 - (b) Moderate Risk (marginal probability of success): Some potential exists for work performance problems including, but not limited to, work schedule disruptions, quality problems, and/or a commensurate increase in contract costs incurred by the Government.
 - (c) Low Risk (good to high probability of success): Minimal or no potential exists for work performance problems, including, but not limited to: work schedule disruptions, quality problems, and/or a limited increase in contract costs incurred by the Government.
- (2) Key Personnel (70%)
- (1) The overall best pricing for products and services (30%)
 - (2) Product evaluations based on web resources, discussions with other information technology professionals and direct experience with product when possible (10%)
 - (3) The vendor's overall performance record, including responsiveness and reputation based on feedback from available references as well as prior satisfactory experience with the University of Marietta (60%)

ITEM	EVALUATION CRITERIA	WEIGHTING	
1	Understanding of the requirements and the technical concepts defined in the Scope of Work, and Compliance of products/services with the requirements	60%	30%
2	Suitability of proposed product(s) for purpose and best fit of proposed product(s) into existing inventory, environment and support structure	15%	
3	The perceived quality of the vendor's response, including completeness, accuracy and appropriateness	10%	
4	Stability/risk of vendor, including assessment of risk, which they may not be able to fulfill responsibilities, and financial strength	15%	
5	The overall best pricing for products and services	30%	70%
6	Product evaluations based on web resources, discussions with other information technology professionals and direct experience with product when possible	10%	
7	The vendor's overall performance record, including responsiveness and reputation based on feedback from available references as well as prior satisfactory experience with the University of Marietta	60%	

6) Scoring Rules

The University of Marietta established RFP scoring guidelines to ensure consistent and unbiased scoring, to remove individual scoring subjectivity, and to achieve a consensus score for each proposal and items within it. Scoring guidelines will have all relevant aspects to the key RFP criteria.

Individual scoring sheets will assist in the process of awarding and totaling points. Consider recording:

- i) Preliminary scores for each criteria/proposal
- ii) Average scores
- iii) Above or below average scores
- iv) Vendor total
- v) Variances
- vi) Weighted scores
- vii) Agreed consensus scores
- viii) Analyses of the relative strengths and weaknesses of each proposal
- ix) Lists of pros/cons/issues for each proposal
- x) Recommendations with rationales

7) Supplemental Information

The University of Marietta may request the vendor to supply, in writing, clarifications, additional documentation, or information needed to fairly evaluate each proposal

8) Presentation

The University of Marietta reserves the right, but is not obligated, to request that each proponent provide a formal presentation at a date and time to be determined.

9) Final Determination

At the completion of Selection Procedures, an undetermined number of vendors will be included on an Approved Contractor List. The University of Marietta may select one or more semi-finalist among the Approved Contractor List and request representatives of the potential vendors to meet with the University in person or by phone to clarify or elaborate on aspects of the written proposal. The potential vendors will be responsible for any travel expenses to participate in a finalist interview. All written and oral responses will be considered in the final selection of the vendor. A qualifying vendor on the Approved Contractor List will be selected as the experienced and qualified company to provide virtualization technology to modernize and virtualize the University's server infrastructure. The University of Marietta, in its sole discretion, reserves the right to modify or change evaluation criteria and to not award a contract.

10) Proposal Rejection

A decision may be made to reject all bids or proposals received. Reasons might include:

- i) A proposal is incomplete, obscure, irregular or unrealistic
- ii) Proponents have non-authorized corrections in the Proposal
- iii) Proponents fail to include any one or more items in the Proposal for what is required by the RFP

INTERNAL DOCUMENTATION

1) Alignment with Strategic Plans

INTRODUCTION

Server virtualization is valuable for creating the best way to consolidate physical servers for The University of Marietta. This results in a partitioned physical server able to run multiple secure virtual servers. Therefore, the virtual server is useful in reducing hardware acquisition and management costs by getting rid of infrastructure sprawl at the server level. For example, transferring a virtual server to a different physical server with more available resources is similar to copying a file. Moreover, maintaining snapshots of virtual server as file backup and restoring complex systems to manage the physical server hardware failures are the principal characteristics of virtual server. Thus, The University of Marietta acknowledges that the overall flexibility benefits result in increasing the usage of physical server resources, reducing the operating costs, decreased power expenditure as well as gaining trustworthiness from server.

STRATEGIC PLANS

- 1) The usage of computing and communication technologies is productive.
- 2) Relevancy to academic and administrative services.
- 3) Reliability of communication and multimedia delivery systems.
- 4) Identification of new technologies and services to users.
- 5) Providing education and guidance to users.
- 6) Prioritizing cost savings on server hardware.
- 7) Capability of a fully managed virtual infrastructure.
- 8) Implementing the virtual environment into a fully automated utility infrastructure.
- 9) The proficiency of adopting a hybrid server virtualization strategy (multiple solutions) in order to eliminate failures on vendor locking in as well as lower cost of serving.
- 10) Server virtualization consolidation provides profit by directing and continuing cost savings, server availability, rapid storing and disaster recover.
- 11) Hardware update saving to ensure adequate performance and efficiency.
- 12) Saving total cost of ownership
- 13) Improving data security for protecting the system.
- 14) Decreasing physical space requirements considers departmental acquisition.

2) Evaluation Worksheet

EVALUATION WORKSHEET

Person or Firm Name _____

Name of Procurement Team Member _____

Date of Review _____

RFP Title _____

Questions

[A] How well does the firm understand the requirements and the technical concepts defined in the Scope of Work?

[B] How well is the compliance of products/services met?

[C] How well does the proposed product(s) fit into the existing inventory, environment and support structure?

[D] How well is the quality of the vendor's proposal, including completeness, accuracy and appropriateness?

[E] Does the firm appear to be financially stable? Is the firm able to fulfill their responsibilities through the project?

[F] Comment on the cost proposal:

[G] Comment on the proposed product based on web resources, discussions with other information technology professionals and direct experience with product when possible:

[H] Has the firm provided letters of reference from previous clients? Did the references provide information to verify the satisfactory performance of the vendor? How successful are they?

3) RFP Evaluators Guide

RFP EVALUATORS GUIDE

INTRODUCTION

You have been selected to serve in the Proposal Procurement Team for a Request for Proposal for virtualization for server infrastructure. The RFP process measures economy and quality when purchasing goods and services, and it ensures fair treatment of vendors desiring to do business with the University of Marietta. The Procurement Team and its functions are an essential part of the process leading to the award of an RFP.

It's important for you as an evaluator to know what will be expected of you before committing to this duty. Being on a Procurement Team will require long hours of concentrated effort. Please carefully consider what you have read in this guide and let the Procurement Officer know if you have any reservations before you start.

THE PROPOSAL PROCUREMENT TEAM

The Purchasing Manager responsible for the project determines the number and makeup of the Procurement Team. The team is usually comprised of five members. The role of the Procurement Team is to award points to the proposals so that they may be ranked. Once ranked, the proposals will be ushered through the remaining process by the Purchasing Manager until an award can be made or the procurement is canceled.

EVALUATION PROCESS DECISION

There are two ways for the Procurement Team to evaluate proposals and document the results:

- 1) The Procurement Team evaluates each proposal and rates them based on **an evaluation-scoring sheet**. Compile the resulting evaluations from all team members, resolve any factual oversights, make sure the resulting team member notes are legible and produce a summary.
- 2) The Procurement Team evaluates each proposal and makes notes about their observations and tentative rating on **an evaluation worksheet**. The team then meets as a group to review the individual proposals. The team arrives at a group consensus as to the associated ratings and produces a summary that constitutes the team's recommendation.

RATING SCALE FOR USE IN EVALUATION

A rating scale is whole numbers intended to establish guidelines within that range to ensure members of the RFP Procurement Team perform their evaluation with consistency. Procurement Team may assign any value for a given criteria from 0 to the maximum number of points. A zero value typically constitutes no response or an inability of the vendor to meet the criterion. In contrast, a three value is the maximum value that constitutes a high standard of meeting the criterion.

RATING SCALE	
VALUE	EXPLANATION
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2	Some applicability
3	Substantial or total applicability

For Example, if a criterion is receiving a weighting of 15% of the total possible points. Using the equation below, a maximum of 15 points can be awarded:

$$\frac{\text{Assigned Value}}{\text{Maximum Value}} \times \text{Weighting Factor}$$

SCORING RULES

The Procurement Team uses RFP scoring guidelines to ensure consistent and unbiased scoring, to remove individual scoring subjectivity, and to achieve a consensus score for each proposal and items within it. Scoring guidelines will have all relevant aspects to the key RFP criteria.

Individual scoring sheets will assist in the process of awarding and totaling points. Consider recording:

- 1) Preliminary scores for each criteria/proposal
- 2) Average scores
- 3) Above or below average scores
- 4) Firm total
- 5) Variances
- 6) Weighted scores
- 7) Agreed consensus scores
- 8) Analyses of the relative strengths and weaknesses of each proposal
- 9) Lists of pros/cons/issues for each proposal
- 10) Recommendations with rationales

4) Evaluation Scoring Sheet

EVALUATION SCORING SHEET

PROJECT: Virtualization for Server Infrastructure			RATING	SCORING	TOTAL
FIRM NAME:					
Evaluation Criteria	Weighting		*(0-3)	**	**(100)
Understanding of the requirements and the technical concepts defined in the Scope of Work, and Compliance of products/services with the requirements	60%	30%			
Suitability of proposed product(s) for purpose and best fit of proposed product(s) into existing inventory, environment and support structure	15%				
The perceived quality of the vendor’s response, including completeness, accuracy and appropriateness	10%				
Stability/risk of vendor, including assessment of risk, which they may not be able to fulfill responsibilities, and financial strength	15%				
The overall best pricing for products and services	30%	70%			
Product evaluations based on web resources, discussions with other information technology professionals and direct experience with product when possible	10%				
The vendor’s overall performance record, including responsiveness and reputation based on feedback from available references as well as prior satisfactory experience with the University of Marietta	60%				
EVALUATION TOTAL:					

*A rating scale is whole numbers 0 to 3:

- ZERO value constitutes no response or an inability of the vendor to meet the criterion
- ONE value constitutes limited applicability
- TWO value constitutes limited applicability
- THREE value constitutes a high standard of meeting the criterion

$$**Score = \frac{\text{Assigned Value}}{\text{Maximum Value}} \times \text{Weighting Factor}$$

5) Financial and ROI Analysis

Estimated ROI for Virtualization

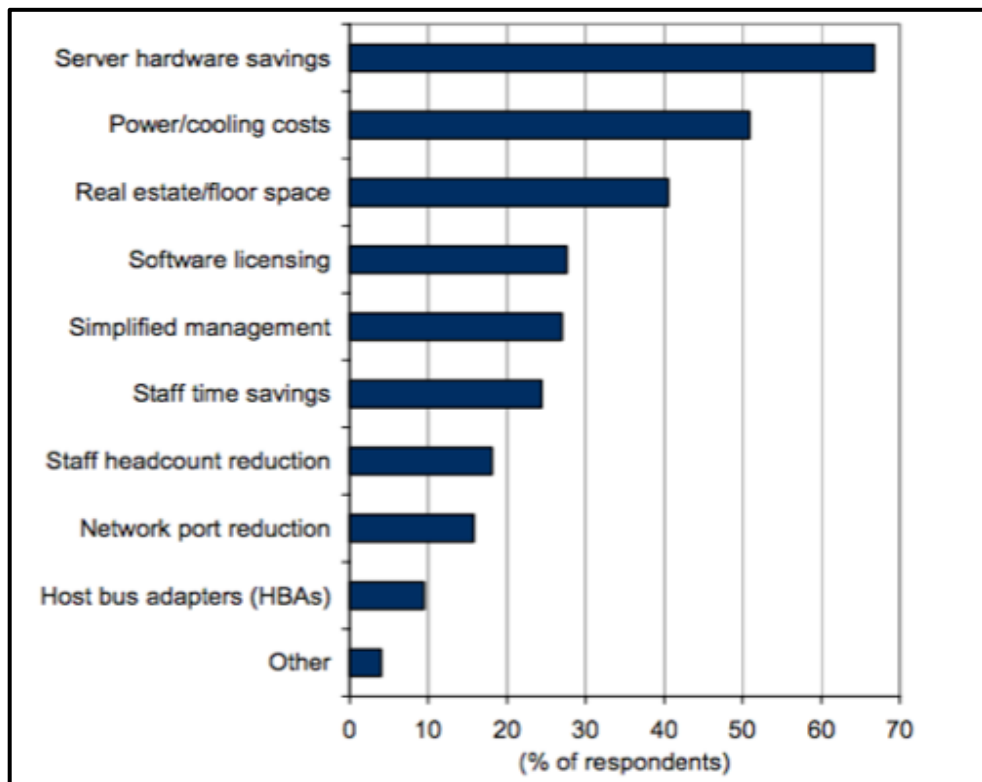
- Figure 1 below provides the best scenario projections for ROI for the virtualization investment:

Figure 1

Return on Investment(ROI)			
Cost /Savings	Year 1	Year 2	Year 3
Virtualization Investment	\$250,000	\$100,000	\$90,000
Savings from Virtualization	\$245,000	\$490,000	\$372,000
Return on Investment(ROI)	-1.20%	292.80%	411%

- Based on research for previous virtualization implementations the following areas of savings were reported which are detailed below in figure 2.
- The information was taken from a survey of 400 different companies who had implemented virtualization into their company.

Figure 2



6) Procurement Team Organization

PROCUREMENT TEAM ORGANIZATION

TEAM SELECTION

The procurement team will consist of five members selected by their financial, technical, and functional expertise within the University of Marietta Organization:

- 1) John Eidson- Purchasing Manager, Technical Requirements Analyst
- 2) Luke Varner- Functional Requirements Analyst
- 3) Supaporn Pankhao- Legal Analyst
- 4) Kornchai Anujhun- Financial Requirements Analyst
- 5) Alina Isani- Documentation and Organizational Structure Analyst

TEAM RESPONSIBILITIES

All of the selected procurement team members will be involved in the evaluation, selection, and rejection of proposal bids. The team members will be primarily responsible for:

- 1) Reviewing and scoring proposal bids
- 2) Participating in presentations and discussions
- 3) Analyzing requirements set forth by the RFP
- 4) Negotiating cost and evaluating ROI
- 5) Involvement in final vendor selection

TEAM CODE OF ETHICS

Procurement team members have been selected based on expertise in a selected subject matter to ensure impartiality and are required to sign a University of Marietta Code of Ethics form provided in this document.

UNIVERSITY OF MARIETTA
REQUEST FOR PROPOSAL
PROCUREMENT TEAM MEMBER'S
CODE OF ETHICS FORM

IMPARTIALITY

All University of Marietta procurement team members certify they have the right and responsibility of assessing the guidelines and requirements set forth in this RFP. This includes active participation and contribution during the selection process and validates that each team member will not be influenced or pressured, directly or indirectly, by anyone outside of the procurement team.

CONFIDENTIALITY

As a member of the procurement team I will not provide any documentation, correspondence, discussions, or proposal bids to any individuals or organizations that are not a part of the procurement team.

CONFLICTS OF INTEREST

Furthermore, I verify that I or any direct family members do not have a financial, personal, or material interest in any of the vendors submitting proposal responses. This confirms that I will review and evaluate proposals based solely on the benefit and merit they can provide to the University of Marietta. Lastly, I will not accept any favors, services, gifts, monetary incentives, or future employment opportunities in connection with this RFP.

Signature _____ Title _____

Printed Name _____ Date _____

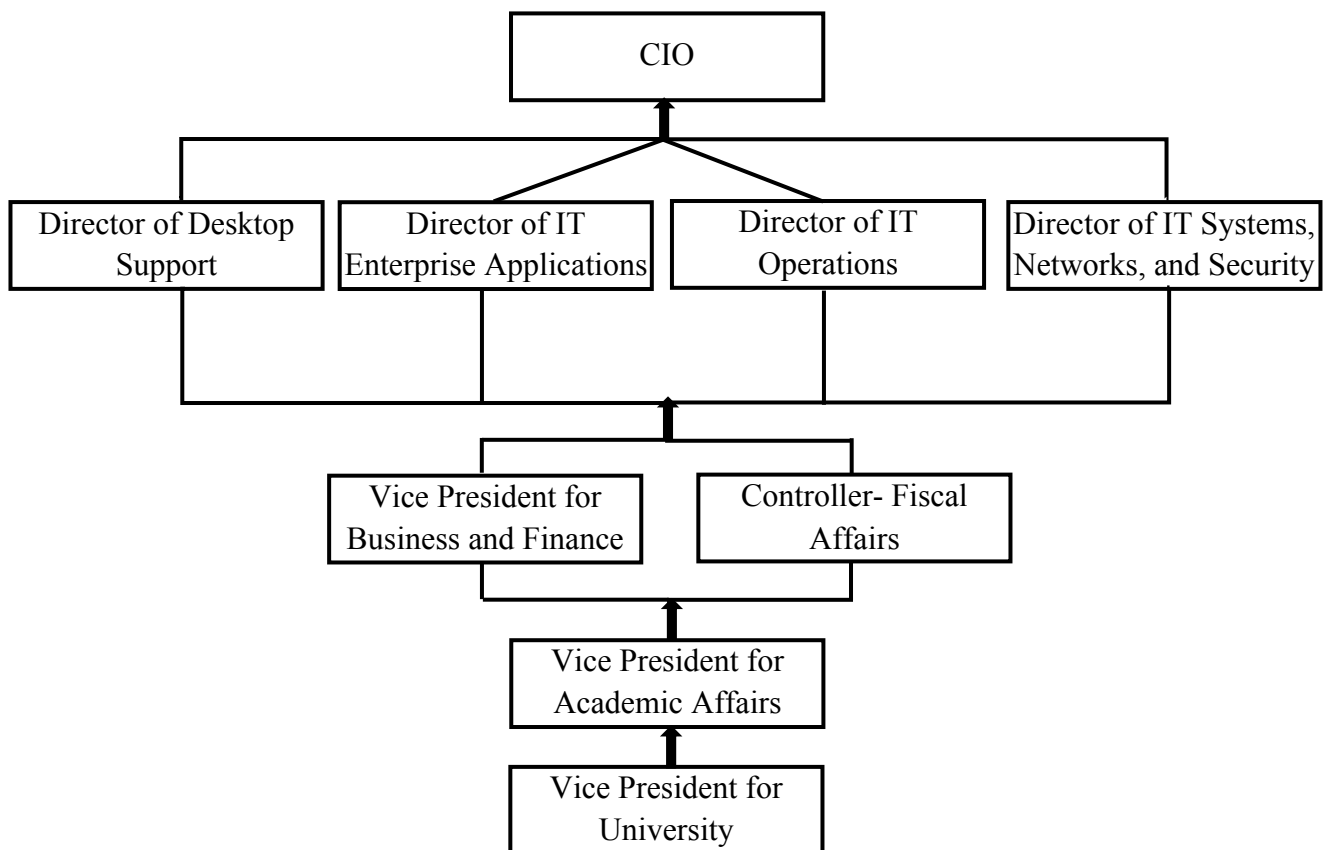
7) Approval Chain

UNIVERSITY OF MARIETTA APPROVAL CHAIN

APPROVAL CHAIN PROCESS

The approval methods selected for the vendor bid decision is based around a selection of individuals with specific expertise as it relates to this RFP.

The approval for acceptance and selection of a vendor bid will follow the chain set forth in the diagram below. The final approval decision will be made by the University of Marietta CIO.



8) Project Plans

Project Timeline

TASK NAME	COMPLETION DATE	NOTE
RFP Team Organization	25-Feb-13	Set up RFP team
Initial Group Meeting for Team Roles & Responsibilities Designation	26-Feb-13	
Release Meeting Schedule	27-Feb-13	
Assumption Poof	05-Mar-13	Go through all assumptions regarding the RFP process
Meeting #1	06-Mar-13	
Meeting #2	10-Mar-13	
Meeting #3	12-Mar-13	
Prepare Assumption Documentation	15-Mar-13	Document all final assumptions
Assumption Presentation	16-Mar-13	Present final assumptions to the board
Project Plan Creation	18-Mar-13	Define RFP steps
Prepare RFP	18-Mar-13	Write RFP document including internal documentation
Complete data collection and documentation	19-Mar-13	
Complete definitions of terms and conditions	22-Mar-13	All terms and conditions must be identified and documented
Identify and document all contracts, all licenses and necessary approvals	25-Mar-13	
Identify and document all owned assets	26-Mar-13	
Complete definitions of mandatory requirements	10-Apr-13	
Prepare and document financials	12-Apr-13	Financial and ROI analysis
Define vendor qualifications	13-Apr-13	This will include all requirements for bidders including technical capabilities and proposal submission requirements
Identify and document all bidder instructions	14-Apr-13	Document bidder instructions and selection process
Finish RFP	15-Apr-13	
Reviews and edits RFP	20-Apr-13	
RFP Release	20-Apr-13	
RFP Response Period	02-May-13	
RFP Due	03-May-13	
First Round of Evaluation	20-May-13	Scoring and ranking bidders. Invitation for top 2 bidders
Bidders Presentations	02-Jun-13	Top 2 bidders presentations
Second Round of Evaluation	28-Jun-13	
Final Determination	30-Jun-13	

9) Vendor Qualifications and Past Performance

EXPERIENCE AND QUALIFICATIONS

Firms will provide the following information and documentation to demonstrate the experience and qualifications of its firm.

INTRODUCTORY INFORMATION

- 1) Firm Name
- 2) Primary Contact Name
- 3) Address
- 4) Phone
- 5) Primary Contact Email
- 6) Website (Optional)
- 7) Company Description

SUMMARY OF QUALIFICATIONS

Firm will provide a one-page summary describing how your firm meets the qualifications required to achieve the University of Marietta objectives and complete the Scope of Work specified in the RFP.

COMPANY DESCRIPTION

In two pages, firm will provide a background description of your firm and an introduction to the proposed project staffing including:

- 1) Identification of the involving staff
- 2) An organization chart of these staff by areas of responsibility
- 3) A description of the processes and procedures for the oversight and review of analytical work, such as reports and data products.

STAFF QUALIFICATIONS AND EXPERIENCE

Firm will provide a background information and documentation for senior staff managing and performing work related to virtualization of server infrastructure. Also, firm should include the following:

- i) Senior staff member biography
- ii) Primary work location for each senior staff member
- iii) Years of professional experience related to the areas of expertise for which the senior staff member is being proposed
- iv) List recent projects and responsibilities for each senior staff member, and provide a summary of these projects
- v) A current resume for each senior staff member

10) Bid Sheet

BID SHEET

BID SHEET FOR: 2013-RFP-Virtualization of Server Infrastructure

CLOSING DATE: Friday, May 03, 2013 at 11:00 a.m. local time

The undersigned firm has carefully examined the Terms and Conditions for the Services requested and will provide the services required.

This Proposal is valid for: _____ days and shall expire on _____

DESCRIPTION	PRICE (\$)
APPLICABLE TAXES:	
TOTAL PRICE:	

Use additional sheet if needed

FIRM NAME: _____

ADDRESS: _____

PHONE: _____ EMAIL: _____

FAX: _____ DATE: _____

*SIGNATURE OF VENDOR: _____

PRINT NAME: _____

*** Must be an official signatory of the firm**

APPENDIX

1) Bid Sheet

BID SHEET FOR: 2013-RFP-Virtualization of Server Infrastructure

CLOSING DATE: Friday, May 03, 2013 at 11:00 a.m. local time

The undersigned firm has carefully examined the Terms and Conditions for the Services requested and will provide the services required.

This Proposal is valid for: _____ days and shall expire on _____

DESCRIPTION	PRICE (\$)
APPLICABLE TAXES:	
TOTAL PRICE:	

Use additional sheet if needed

FIRM NAME: _____

ADDRESS: _____

PHONE: _____ EMAIL: _____

FAX: _____ DATE: _____

*SIGNATURE OF VENDOR: _____

PRINT NAME: _____

*** Must be an official signatory of the firm**