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State of West Virginia Department of Administration Quotation **Purchasing Division** 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

# Request for

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ADDRESS CORRESPONDENCE TO ATTENTION OF

KRISTA FERRELL 304-558-2596

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DEPARTMENT OF ADMINISTRATION IS&C - DIVISION DIRECTOR ONE DAVIS SQUARE

CHARLESTON, WV 25301

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## GENERAL TERMS & CONDITIONS REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

- 1. Awards will be made in the best interest of the State of West Virginia.
- 2. The State may accept or reject in part, or in whole, any bid.
- 3. All quotations are governed by the West Virginia Code and the Legislative Rules of the Purchasing Division.
- 4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125.00 registration fee.
- 5. All services performed or goods delivered under State Purchase Orders/Contracts are to be continued for the term of the Purchase Order/Contract, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
- 6. Payment may only be made after the delivery and acceptance of goods or services.
- 7. Interest may be paid for late payment in accordance with the West Virginia Code.
- 8. Vendor preference will be granted upon written request in accordance with the West Virginia Code.
- 9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
- 10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
- 11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
- 12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
- 13. BANKRUPTCY: In the event the vendor/contractor files for bankruptcy protection, this Contract may be deemed null and void, and terminated without further order.
- 14. HIPAA Business Associate Addendum The West Viginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (http://www.state.wv.us/admin/purchase/vrc/hipaa.htm) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Covered Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.

#### INSTRUCTIONS TO BIDDERS

- 1. Use the quotation forms provided by the Purchasing Division.
- 2. SPECIFICATIONS: Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as EQUAL to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
- Complete all sections of the quotation form.
- 4. Unit prices shall prevail in cases of discrepancy.
- 5. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
- 6. BID SUBMISSION: All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications.

### SIGNED BID TO:

Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130



ANDOR

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State of West Virginia
Department of Administration
Purchasing Division

Request for
Quotation 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

# Request for

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ADDRESS CORRESPONDENCE TO ATTENTION OF

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304-558-2596

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Department of Administration
Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

TERMS OF SALE

## Request for Quotation

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DEPARTMENT OF ADMINISTRATION IS&C - DIVISION DIRECTOR ONE DAVIS SQUARE

CHARLESTON, WV

VENDOR Ö 25301 304-558-5472 F.O.B. FREIGHT TERMS TERMS OF SALE SHIP VIA DATE PRINTED 05/07/2008

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CHARLESTON, WV 25301

304-558-5472

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CHARLESTON, WV 25301

304-558-5472

DATE PRINTED TERMS OF SALE SHIP VIA FO.B FREIGHT TERMS 05/07/2008 BID OPENING DATE: 05/27/2008 **BID OPENING TIME** 01:30PM QUANTITY LINE UOP ITEM NUMBER UNIT PRICE AMOUNT: PURCHASING APPROPRIATE INFORMATION VERIFYING THAT BIDDER HAS PAID THE REQUIRED BUSINESS TAXES, PROVIDED THAT SUCH INFORMATION DOES NOT CONTAIN THE AMOUNTS OF TAXES PAID NOR ANY OTHER INFORMATION DEEMED BY THE TAX COMMISSIONER TO BE CONFIDENTIAL. UNDER PENALTY OF LAW FOR FALSE SWEARING (WEST VIRGINIA CODE 61-5-3), BIDDER HEREBY CERTIFIES THAT THIS CERTIFICATE IS TRUE AND ACCURATE IN ALL RESPECTS; AND THAT IF A CONTRACT IS ISSUED TO BIDDER AND IF ANYTHING CONTAINED WITHIN THIS CERTIFICATE CHANGES DURING THE TERM OF THE CONTRACT, BIDDER WILL NOTIFY THE PURCHASING DIVISION IN WRITING IMMEDIATELY. BIDDER: DATE: SIGNED: TITLE: \* CHECK ANY COMBINATION OF PREFERENCE CONSIDERATION(S) IN EITHER "A" OR "B", OR BOTH "A" AND "B" WHICH YOU ARE ENTITLED TO RECEIVE. YOU MAY REQUEST UP TO THE MAXIMUM 5% PREFERENCE FOR BOTH "A" AND "B". (REV. 12/00) NOTICE A SIGNED BID MUST BE SUBMITTED TO: SEE REVERSE SIDE FOR TERMS AND CONDITIONS. SIGNATURE TITLE ADDRESS CHANGES TO BE NOTED ABOVE



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### RFQ FOR E-MAIL ARCHIVING PRODUCT(S)

### BACKGROUND:

E-mail Archiving is a service we plan to provide to our user community. We are currently consolidating agency e-mail to one Exchange environment. After consolidation, we will have approximately 16,000 mailboxes with an estimated average of 50 e-mails per day per user. We are currently running two backend active and one backend passive mail servers at the same location in the same Exchange cluster. We will be increasing the number of active backend servers to four in 2008. These servers are IBM Blade Servers, two CPU's per server, 64-bit capable currently running 32-bit. Differentials are taken nightly during Monday through Friday using Tivoli TMX and take a little less than one (1) hour. A full-backup is taken on the weekends and takes over seven (7) hours.

There is no official email retention policy active at this time but after implementing the archiving solution, we plan to implement a 90-day retention policy.

#### REQUIREMENTS:

The Vendor must provide the software, as well as the design, installation, and configuration of the product under the supervision of the Office of Technology. Vendor services must include the design, installation and configuration of the migration product itself, the rollout to the users, the initial migration of email data, and the archiving of the data to an EMC Centera.

The vendor will also be expected to train the Office of Technology technical staff (three or four people) to administer and support the product once installed. This training will be in the form of knowledge transfer while working with the vendor during the design, installation and configuration of the product as well as the migration and archiving of the data.

Product(s) must be in the Leader or Challenger quadrant of the "Magic Quadrant" contained in the latest Gartner Research for E-mail archiving. These products are Symantec's Enterprise Vault and EMC's EmailXtender; therefore, vendors bidding only these two products will be considered.

Product(s) must work with MS Exchange 2003 and MS Exchange 2007. We are currently using Exchange 2003 but in the next two years, we expect to upgrade to Exchange 2007.

Product(s) must work with MS Outlook 2003 and MS Outlook 2007. We are currently supporting both Outlook 2003 and Outlook 2007.

Product(s) must work with MS Outlook Web Access 2003 and MS Outlook Web Access 2007

Product(s) must interface with Active Directory.

Product(s) must have the ability to archive existing PST files.

Product(s) must have the ability to purge messages from the Exchange data store and Outlook PST file, archive them and give the end user the illusion of an infinite Exchange mailbox.

Product(s) must be compatible with an EMC Centera storage device.

Product(s) must provide search capabilities for both documents and attachments. All licensed users will need the ability to search the archive for their own emails. We would estimate that 10 users need to search other people's archives.

Product(s) must have the capability to support archive and retention policies based on Active Directory groups, users, organizational units and records classifications.

The VENDOR must have a dedicated, fulltime sales representative managing the State of West Virginia's account who can be reached via telephone and/or e-mail between the hours of 8:00 a.m. to 5:00 p.m. EST. We understand that this sales representative may be handling other accounts but his/her workload must permit a response time of no more than four business hours from receipt of call or e-mail.

The VENDOR must provide Help Desk type of support to provide assistance and guidance on what to buy, any prerequisites, and problems encountered. This support must be provided via telephone and/or e-mail from 8:00 a.m. to 5:00 p.m. EST.

The VENDOR, by signing this bid, is confirming that they meet all of the mandatory requirements of this RFQ.

The State reserves the right to utilize inter-state agreements, such as the Western States Contracting Alliance (WSCA), to purchase hardware and software, outside of the terms and conditions of any contract resulting from an award of this RFQ, pursuant to West Virginia State Code, Section §5A-3-19.

### **COST SHEET**

The WV Office of Technology plans to buy between 4,000 and 5,000 licenses during the next eighteen months but we will be procuring licenses in smaller increments as agencies are converted; therefore, the for the purposes of this evaluation, the Software Costs will be based on 4,000 licenses at the 2,500+ price.

Please note that if you must bid more than one product to meet the requirements of this RFQ, the costs must be combined on Spreadsheet A and then the vendor can attach additional spreadsheets showing the individual products and costs. For instance, if you are bidding EmailXtender, the unit cost must include EmailXtender, User Cache licenses, and DiskExtender licenses.

The costs for on-going support are based on the first year and second year after purchase. For instance, if we buy 2,500 user licenses on July 1, 2008, the on-going support would cover the cost of support from July 1, 2008 – June 30, 2009 and July 1, 2009 – June 30, 2010.

The vendor must show the hourly rate charged for the design, installation, configuration, migration and training. Any travel and expenses must be built into the hourly rate.

### SPREADSHEET A

MINIMUM QUANTITIES	UNIT COST	ANNUAL SUPPORT	TOTAL COST
1, 2, 3, or 4			
5-24			
25-49	······································		
50-99			
100-249			
250-499			
500-999			
1,000 – 2,499		-	
2,500+			

Total Cost = Unit Cost + Annual Support

Hourly Rate:

For this Cost Evaluation, we are using the following scenario. We are buying 4,000 licenses and support, and 120 hours of vendor consulting services.

#### COST EVALUATION:

Software Costs (total cost @ 2,500+ rate x 4,000 licenses)	<b>[</b> \$
Vendor Services (hourly rate x 120 hours)	\$
Total	\$
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RFQ N	ο.

## STATE OF WEST VIRGINIA Purchasing Division

## PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate

### **DEFINITIONS:**

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

**EXCEPTION:** The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

**LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

**CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendors should visit **www.state.wv.us/admin/purchase/privacy** for the Notice of Agency Confidentiality Policies.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), it is hereby certified that the vendor acknowledges the information in this said affidavit and are in compliance with the requirements as stated.

Vendor's Name:	
Authorized Signature:	Date:

Purchasing Affidavit (Revised 06/15/07)