

REQUEST FOR PROPOSALS

SAAS COLLABORATION, OFFICE PRODUCTIVITY, AND E-MAIL SOLUTION

Issued: June 29, 2010

Submission Deadline: August 13, 2010

Legislative Services Agency
State Capitol
Des Moines, Iowa 50319

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I. GENERAL INSTRUCTIONS AND INFORMATION

A. Request For Proposals

The Iowa Legislative Services Agency (LSA) is seeking proposals from qualified companies interested in the establishment, by contract, of an off-premise-based collaboration, office productivity, and e-mail system solution offered in a Software as a Service (SaaS) model or other hosted system. The LSA currently provides e-mail and ancillary applications directly through a premises-based system to the members and staff of the Iowa General Assembly.

At a minimum, the scope of this Request For Proposals (RFP) includes a secured agency-wide e-mail solution with standard e-mail capabilities, calendar function, e-Discovery, data migration (archives and backups) defined during implementation planning, collaboration solutions, and internal administrative capability. Additionally, solutions related to office suite technologies may be explored and included at the LSA's discretion along with other features that might be identified in each bidder's response.

Contractor selection will be made based on an evaluation by the LSA utilizing factors including but not limited to: the bidder's ability to provide the specified services; proposed cost; conformance to the specifications and requirements outlined in the RFP; and the LSA's best interests. All forms and requirements noted in the RFP must be completed and included with a proposal. The LSA reserves the right to reject any and all proposals and the right to waive any informalities in the proposal when to do so would be in its best interest.

The LSA intends to seek proposals that are advantageous to its support approach, limit its financial liabilities, and involve no financial impact associated with contracting. The LSA reserves the right to award one contract, a partial contract, or multiple contracts resulting from this RFP. The LSA also reserves the right to cancel the RFP process or not to award a contract.

B. Proposal Process

1. Open Phase

The Open Phase begins with the issuance of this RFP and ends on the proposal due date, pursuant to the following schedule:

RFP Issued	Tuesday, June 29, 2010
Deadline for Bidders to Submit Questions	4:00 p.m., Wednesday, July 21, 2010 (Central Daylight Time)
Responses to Bidders' Questions	Monday, August 2, 2010
Deadline for Bidders to Submit Proposals	4:00 p.m., Friday, August 13, 2010 (Central Daylight Time)
Selection of Bidder as Potential Consultant	Friday, August 27, 2010

Bidders will be given an opportunity to electronically submit questions related to this RFP. All questions should be submitted in writing via e-mail to megan.thompson@legis.state.ia.us by the date and time specified in this section. The questions must be submitted via e-mail and other forms of questions are not permitted. All bidder questions and responses will be posted on the Iowa General Assembly's Internet homepage.

2. Evaluation and Recommendation Phase

The Evaluation and Recommendation Phase commences with the submission of proposals on or before the stated deadline. It includes an evaluation period and a notice of award.

3. Contract Negotiation and Execution Phase

Upon a notice of award, the Contract Negotiation and Execution Phase will commence immediately. Any contract resulting from this RFP will be executed promptly.



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II. STATEMENT OF WORK

The SaaS E-Mail and Collaboration Solution replaces the Iowa General Assembly's current e-mail solution and adds collaboration tools. The General Assembly expects to replace 400 to 600 user e-mail accounts immediately, dependent on scheduling. The exact quantities of e-mail accounts will be determined during the implementation planning phase. The exact quantities of e-mail accounts are unknown and will be determined through service requests. Proposals should include a pricing methodology that accounts for growth and allows those contracting for the service initially to receive a price point similar to those contracting later. Also, if there are volume pricing points, the proposal must provide a detailed plan for insuring that those who moved to the model first are not at a disadvantage over the life of the contract term.

III. SOLUTION SPECIFICATIONS

The LSA intends to establish the following types of solutions, services, and capabilities provided in an SaaS model or other hosted system. The LSA will ONLY consider proposals from firms that have successfully implemented solutions similar to the solution specifications identified in this section. Bidders are required to complete the RFP bidder checklist attached, as well as provide details on how their proposals meet the LSA's specifications.

Cost details must be identified for every capability listed in this section. Bidders are encouraged to include other related solutions or capabilities in their proposal that may not be specifically listed in this section. It is required that all of these criteria are addressed within the bidder's proposal. The LSA reserves the right to select a solution that is in its best interest. If additional solutions or capabilities are listed, the bidder should clearly separate these additional solutions or capabilities in both substance and pricing.

A. E-Mail

Provide details on how the proposed solution meets the following e-mail criteria:

1. Basic e-mail functionality including send, receive, format, and attachments;
2. Ability to create user-defined e-mail groups;
3. Ability to create user-defined personal folders;
4. Ability to search user-defined e-mail groups based on search criteria;
5. Ability to search user-defined personal folders and contents based on search criteria;
6. Ability to define rules for e-mail handling;
7. Ability to add both personal signatures and notes;
8. Ability to push contact lists and web links to mobile devices;
9. Ability to retain e-mail (List per-user limit, if any);
10. Ability to copy, move, and store information to desktop or local storage;
11. Ability to print stored information locally;
12. Ability to scan or fax from multifunction devices to e-mail;
13. Ability to establish remote printing to a designated facility;
14. Ability to send, assign, and delegate tasks;
15. Ability to use e-mail system remotely;
16. Ability to delegate e-mail functionality to another staff member (i.e., proxy assignments, including mail/phone, appointments, reminder notes, tasks, etc.);



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17. Ability to define proxy access limitations (e.g., Read/Write; Subscribe to Alarms and Appointments, modify Options, Rules, and Folders);
18. Ability to retract and/or retrieve e-mails within e-mail system;
19. Ability to use native applications to view attachments (MS Office, Adobe, QuickTime and Flash);
20. Ability to undo (formatting, delete, copy/paste, etc.);
21. Ability to use List serve capabilities; and
22. Ability for migrated e-mails to maintain header information including sender, recipient, date/time, cc:, bcc:, attachments, etc.

B. Contact Management

Provide details on how the proposed contact management solution meets the following criteria:

1. Basic contact management functionality, including but not limited to last name, first name, middle initial, department, title, business address, mailing address, multiple phone contacts, contact log, e-mail address, notes, categorization, etc.;
2. Ability to synchronize contact information with desktop applications;
3. Ability to synchronize contact information with industry standard mobile devices;
4. Ability to share contact lists; and
5. Ability to use contacts to initiate phone call; integrated call control using Java Telephony API (JTAPI).

C. Calendar

Provide details on how the proposed calendar solution meets the following criteria:

1. Basic calendaring functionality, including but not limited to appointment, event, and sharing;
2. Ability to view multiple calendars at the same time (both personal and global);
3. Ability to schedule resources, including facilities, conference rooms, and equipment management;
4. Ability to manage resources by proxy (e.g., delegate calendar management, set “view-only” or “edit” rights, etc.) to another staff member;
5. Ability to print calendars locally in standard formats (such as agenda, daily, weekly, monthly, Franklin format, etc.);
6. Ability to view and schedule from “free-busy” information;
7. Ability to categorize events;
8. Ability to import and export calendars;
9. Ability to add new attendee to existing event;
10. Ability to manage priority of event; and
11. Ability to view or hide appointment details.

D. e-Discovery

Provide details on how the proposed e-Discovery solution identifies and retrieves data, per the following criteria:

1. Ability to search based on the following criteria:
 - a. Content;



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- b. Sender and/or recipient;
 - c. Date range; and
 - d. Metadata.
2. Ability to store search results with any metadata; and
 3. Ability to add and delete from search results to create an e-Discovery set.

E. Solution Administration

Provide details on how the proposed solution meets the following system administration requirements:

Ability, from the administrative console, to:

1. Fully manage all accounts within the network, including but not limited to addition, deletion, manipulation, suspension, and termination;
2. Fully manage SaaS identity and user accounts;
3. Control spam or provide anti-spam;
4. Control virus or provide anti-virus (including spyware);
5. Apply content filter;
6. Apply policies in managing solutions;
7. Review restricted e-mail;
8. View all calendars and appointments;
9. Print historical, statistical, and usage reports locally;
10. Prioritize e-mail accounts;
11. Manage attachment size;
12. Set up mail routing;
13. Manage multiple separate Global Address Lists;
14. Use "Whitelist," "Blacklist," and aliases;
15. Perform e-Discovery functions (search, retrieve, manipulate search results, etc.) on all accounts;
16. Ability to use a variety of domain names used within governmental entities as e-mail extensions;
17. Ability to synchronize e-mail identities with identities that are managed in the governmental entities internal authentication directory;
18. Ability to synchronize BlackBerry, Treo, iPhone and other such mobile/smart devices, with, at a minimum, calendar, contacts, and e-mail functionality (e.g., BlackBerry Enterprise Server, etc.);
19. Set e-mail storage limits per user based on maximum storage limits that are set by the governmental entities;
20. Integrate with internal applications using e-mail, specifically using SMTP, IMAP, SOAP, POP3, etc.;
21. Manage Domain Name System (DNS);
22. Migrate Historical or user Archives from a variety of proprietary formats to proposed solution after implementation;
23. Ability to administer the solution in a distributed manner to different governmental entities; and
24. Set automatic settings for auto archive, auto delete, etc.



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F. Archive and Backup

Provide how the proposed solution meets the following archival requirements:

1. Ability to store and retrieve all live e-mail data for a minimum of 180 days: 90 days available to the user and 90 additional days available to system administrators before data is automatically processed for long-term archive. The offerer should describe how the proposed solution will allow separate governmental entities to set independent and distinct storage and retrieval parameters based on their needs. If there are limitations on the flexibility of separate governmental entities to set independent and distinct storage and retrieval parameters, these limitations must be noted as well;
2. Ability to archive data based on content, sender, recipient, and/or other metadata with different archival periods per governmental policy or legal requirements;
3. Ability to retrieve or e-Discover archived data based on content, sender, recipient, and/or other metadata with different archival periods;
4. Ability to view and perform all normal e-mail functions on archive by an e-mail administrator without having to restore; and
5. Ability to restore archived e-mail data to "live" status.

G. Disaster Recovery

Consider the following specifications for disaster recovery (DR):

1. Service restoration within four hours of service interruption defined as any instance where basic functions cannot be performed or users are unable to access accounts via desktop or mobile devices;
2. Annual testing of DR plan;
3. Mitigation of deliberate destruction of backup data and/or equipment;
4. Written business continuity plan;
5. Predefined identification of roles and responsibilities;
6. Identify qualifications for initiating and ceasing "Disaster" condition; and
7. Identify the frequency and types of communications that will be sent regarding service interruptions; scheduled or unscheduled.

H. Collaboration

Provide details on how the proposed collaboration solution meets the following criteria:

1. Ability to share data and files stored within the solution;
2. Ability to have multiple individuals work on common files at the same time from different or separate work locations;
3. Ability to collaborate with individuals that are telecommuting or otherwise away from a facility;
4. Ability for users to track changes on shared or common files;
5. Ability to maintain version control (i.e., who, what, when);
6. Ability to recover or revert to prior versions; and
7. Ability for administrators to control the creation of collaboration sites at the individual user level.

I. Instant Messaging

Provide details on how the proposed solution would additionally meet the following instant messaging (IM) criteria:

1. Internal messaging;



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2. External messaging;
3. Ability to track IM; and
4. Ability to filter IM.

Bidders shall also describe how the solution will handle migration of current data, and if there are any limitations regarding migration of data they must be clearly noted.

J. Video Conferencing

Provide details on how the proposed solution can meet the following video conferencing criteria:

1. One-to-one internally and externally;
2. Multiple locations internally and externally;
3. Ability to provide real-time on-screen notation;
4. Ability to provide Remote Desktop Access/Control during video conference;
5. Provide Tracking Options; and
6. Ability to record.

K. Virtual Drives

Provide details on how the proposed ancillary solution can additionally meet the following virtual drive and SaaS storage criteria:

1. Ability to store files (all types) and work as a virtual drive on the PC desktop/laptop and with the operating system file manager;
2. Ability to search (e-Discovery) files;
3. Ability to use local and SaaS office productivity tools; and
4. Ability to track virtual drives.

L. Unified Communication Services

Provide details on how the proposed ancillary solution can additionally meet the following communication services criteria within the proposed solutions:

1. Ability to use "TTY" communication; and
2. Ability to receive voice mails into an e-mail account.

M. Office Productivity Applications

Provide details on how the proposed solution can meet the following Office Productivity criteria:

1. Word processing;
2. Spreadsheet capability;
3. Mid-tier database;
4. Presentation tools;
5. Ability to read, open, edit, and display standard office product formats; and
6. Ability to migrate historical documents, spreadsheets, presentations, and databases.

If a bidder's solution is unable to meet the above Office Productivity criteria, it will not automatically be disqualified from being awarded a contract in whole or in part. However, the LSA reserves the right to select a solution that best fits its needs and is most advantageous to the organization.



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N. Integration

Provide specific details on how the proposed solution integrates with each of the following:

1. Mobile devices;
2. Applications that use e-mail notifications;
3. Infrastructure devices that use e-mail notifications;
4. Novell Identity Management and Microsoft Lifecycle Manager;
5. Novell e-Directory, LDAP, or Microsoft Active Directory; and
6. Files stored on-site.

O. Training

Provide a high-level overview of the training to be included with the proposed solution based on each of the following:

1. Train-the-Trainer for in-house LSA and governmental entity staff training;
2. Administrative staff; and
3. Availability of on-line training (by function).

P. Security

Provide specific details (i.e., procedures, protocols, etc.) on how the proposed solution addresses each of the following:

1. Segregation of governmental entity's data from other customers' data;
2. Segregation of one governmental entity's data from another governmental entity's data;
3. Access to governmental entity's data by its staff;
4. Access to governmental entity's data by nongovernmental entity's staff;
5. Governmental entity data remains within the continental United States;
6. Data encryption, and, if encryption keys are used in the proposed solution, description of the architecture and ownership of keys for decrypting;
7. Architecture for storing agency data, and storage in original format and in known datacenters;
8. Methods for preventing user data leakage in the e-mail system, such as forwarding or sending data to untrusted parties and the protection of delicate data; and
9. Description of "Beta" software if used in any part of the proposed solution.

Q. Materials and Equipment

Bidder must provide the following material and equipment requirements:

1. All items (tools, software, licenses, maintenance, network throughput, and hardware) that are required within the LSA's or a governmental entity's internal network to support the proposed solution;
2. All items (tools, software, licenses, maintenance, and hardware) that the LSA or a governmental entity is required to have in addition to the proposed solution;
3. Service Level Agreement for escalation of issues or product improvement;
4. Minimum workstation requirements for the proposed solution;
5. Indicate whether a governmental entity's existing e-mail solutions must remain active during migration of archived e-mail; and



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6. Indicate if the proposed solution can coexist with other e-mail platforms.

R. Service Level Agreements (SLAs)

Provide the following SLA and sustainability details for all services proposed under the Statement of Work section:

1. Provide SLAs;
2. Provide system up-times over past 12 months for proposed solution;
3. Ability to provide monthly outage reports that explain reason(s) for outage and steps to prevent outages in the future;
4. Provide solution upgrade philosophy, user effect, and life cycle;
5. Provide demonstrated availability statistics as provided to actual customers, including the customers being cited;
6. Any proposed plan should take into consideration minimizing disruption to business during implementation;
7. Describe system's high availability (HA) strategy solution which includes fault tolerance and fail-over in order to provide 99.99 percent system availability; and
8. Describe approach to ensure system and data integrity.

S. Certifications

The bidder must provide information as to whether the solution is compliant with the following federal regulations:

1. Health Insurance Portability Act;
2. Family Educational Rights and Privacy Act;
3. Federal Information Security Management Act; and
4. Any other certifications that are typical within government sector programs.

If the solution is not compliant, the bidder should detail any plans to come into compliance within 12 months.

T. Ownership of Data

All data, including but not limited to e-mail, attachments, collaboration files, etc., migrated from or entered into the bidder's solution from the LSA, a governmental entity or its authorized users, remains the sole property of the originator. This data also includes archived, backed-up, current, or data stored by or for the LSA and/or a governmental entity or authorized user in any other form.

Ownership of the data will remain the sole property of the originator. The bidder is not authorized to use, sell, resell, package, repackage, or publicly display any information without the express written approval of the originator.

The bidder should provide details on how all data will be returned to the LSA or the General Assembly (in an industry standard data format) and an estimated time frame for return of said data if and when the contract is not renewed. No data can be retained by the bidder in any media (including hard copies) after termination of this contract.

The LSA and the Iowa General Assembly, as originators and owners of their own data, control access to the data in accordance with the powers and duties granted to the Iowa General Assembly by the Constitution of the State of Iowa. The bidder, in granting access to any person to such data, may do so only with the express permission of the LSA or the Iowa General Assembly, or their designated agents.



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IV. SUBMITTAL REQUIREMENTS

A. Format and Timing

1. Proposals must be received in-house by the LSA no later than the time and date specified in Part I, Section B.
2. A bidder shall submit a completed proposal to the LSA as follows:
 - a. The bidder shall submit one copy of the completed proposal in an electronic format by electronic mail to the LSA at the following address: megan.thompson@legis.state.ia.us
 - b. The bidder shall supply one unbound copy of a completed proposal in a printed format to the LSA with confidential information identified as provided in Section D of this Part IV at the following address:

Legislative Services Agency
Response to RFP
Attention: Megan Thompson
State Capitol
Des Moines, Iowa 50319

3. The LSA will not accept a proposal submitted by fax.
4. A bidder is exclusively responsible for verifying the time and date that its proposal has been received by the LSA.
5. Except as otherwise provided in this paragraph, the LSA will not accept the late submission of a proposal. The LSA may extend the deadline for all potential bidders only if it finds that an extraordinary situation prevents one or more bidders from submitting timely proposals. The LSA reserves the right to reject any proposal which is incomplete, as if it were a late submission.

B. Detailed Company Information — Cover Letter

Each proposal must be accompanied by a one-page cover letter that references the title of this RFP, contains a general statement of the purpose for submission, and includes the following detailed company information:

1. Full legal name of the bidder;
2. Legal business status (individual, partnership, corporation, etc.), address, and telephone number of the bidder;
3. If the bidder is a corporation, partnership, LLP, LLC, etc., identify the state under whose laws the bidder is organized. Otherwise, if the bidder is an individual, identify the state where the bidder is domiciled; and
4. Name, title, address, and telephone number of the person or persons authorized to represent the bidder in order to enter into negotiations with the LSA with respect to the RFP and any subsequent awarded contract. The cover letter must also indicate any limitation of authority for any person named.

C. Experience

To evaluate a bidder's qualifications and experience, as set forth in this RFP, all proposals submitted in response to this RFP must include detailed information regarding applicable experience, including but not limited to the following:

1. A detailed description of a bidder's qualifications and experience in providing services similar to those proposed in this RFP within the past three to five years.
2. A representative list of clients for which the bidder has provided services, within the past three to five years, similar to those proposed in the RFP. References must include a contact name and telephone number of an individual familiar with the described services.
3. A list of government entities with whom the bidder holds current contracts for services and solutions similar to those proposed in the RFP.



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4. In addition, each proposal must describe the bidder's commitment to sustaining and future development of submitted solutions.

D. Confidential Information

The release by the LSA of information relating to proposals in response to this RFP to the public is deemed by the LSA and the Iowa General Assembly to be subject to Iowa Code Chapter 22 and other applicable provisions of law relating to the release of records in the possession of a State agency. Bidders are encouraged to familiarize themselves with these provisions prior to submitting a proposal. All information submitted by a bidder may be treated as public information by the LSA unless the bidder properly requests that information be treated as confidential at the time of submitting its response.

Any requests for confidential treatment of information must be included in a cover letter with the written copy of the bidder's response and must enumerate the specific grounds in Iowa Code Section 22.7 or other legal reasons which support treatment of the material as confidential and must indicate why disclosure is not in the best interests of the public. Requests for confidential treatment of any portion of the bidder's response will be evaluated by the LSA and will not be automatically granted. Requests must also include the name, address, and telephone number of the person authorized by the bidder to respond to any inquiries by the LSA concerning the confidential status of the materials.

Any documents submitted which contain confidential information must be identified as containing confidential information, and each page upon which confidential information appears must be marked as containing confidential information. The confidential information must be clearly identifiable to the reader wherever it appears. The response in printed format submitted by the bidder must be marked in this manner.

The bidder's failure to request in its response confidential treatment of material pursuant to this section, and the relevant laws and administrative rules will be deemed as a waiver of any right to confidentiality which the bidder may have had.

The LSA will not act as a party in any lawsuit to protect the rights of a bidder, prospective consultant, or the Consultant.

The laws of Iowa require that at the conclusion of the selection process the contents of all proposals be placed in the public domain and be open to inspection by interested parties.

E. Accuracy and Completeness

The cover letter and proposal must set forth accurate and complete information as required in this RFP. Unclear, incomplete, and/or inaccurate documentation will not be considered. Falsification of any information may result in disqualification from the selection process, or in termination of a contract, if discovered in the future. If a bidder knowingly and willfully submits false performance or other data, the LSA reserves the right to reject the bidder's proposal and to take whatever legal action it deems appropriate. If it is determined that a contract was awarded as a result of false performance or other data submitted in response to this RFP, the LSA reserves the right to terminate the contract and to take whatever legal action it deems appropriate. Portions of a proposal that include content from this RFP that have been altered in any manner must be clearly noted.

F. Signature Requirements

The proposal and cover letter must be signed by a representative or officer of the bidder and that representative shall be authorized to bind the bidder to all provisions of the proposal, the RFP, any subsequent changes, and to the contract if an award is made.

If the bidder is a partnership, the proposal and cover letter must be signed in the name of the partnership by a general partner thereof. If the bidder is a corporation, the proposal and cover letter must be signed on behalf of the corporation by two authorized officers (a chairman of the board, president or vice president, and a secretary, treasurer, or chief financial officer) or an officer authorized by the board of directors to execute such documents on behalf of the corporation.



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G. Financial Information

A bidder shall provide validated evidence of its financial condition. The last three years of CPA-certified annual reports or annual operating statements, and any interim statement supplement completed within the prior six months, is one way of satisfying this requirement.

H. Personnel Information

The personnel assigned to a project must have prior experience successfully implementing projects of similar scope and complexity.

The bidder shall include the names of all key personnel who are employed by the bidder and the proposed subcontractor(s) who would be assigned to perform services pursuant to a contract. The selected bidder shall use only experienced, responsible, and capable people in the performance of the work. The selected bidder shall remove from the job employees who endanger persons, property, or whose continued employment under contract is inconsistent with the interest of the LSA.

The bidder shall designate a Project Manager with full authority to administer the contract for the project's design, development, installation, acceptance testing, and training on behalf of the bidder.

The bidder shall also provide an organizational chart of the contractor's company, depicting its parent company, subsidiaries and subdivisions if any, plus relationships to such other companies. The chart shall also illustrate the chain of command from the head of the company to the Project Manager.

I. References

The bidder shall include a list of similar recent projects that were successfully completed. The bidder shall provide a description, the size of each implementation, and the name and phone number of a person the evaluation team can contact for verification purposes.

The bidder is required to provide references for the last three to five years.

J. Language and Units of Measurements

Proposals and all documents submitted in connection with this RFP shall be written in the English language and all numerical data furnished herein shall use the dollar-foot-pound-second system of units of measurement, except where specified.

K. Contract Documentation

Contract documentation will begin immediately following the notice of award by the LSA. To expedite the contract period, the bidder shall submit a DRAFT contract, which takes into account the laws, rules, and regulations that govern the State of Iowa for review by the LSA.

Notwithstanding any other provision regarding choice of law and forum to the contrary, the DRAFT contract shall expressly provide that the LSA shall be immediately notified in the event of a request for release of information pursuant to a valid legal process such as a search warrant, court order, or subpoena, and that any decision regarding the release of such information shall be made by the LSA and in accordance with previously established policy by the LSA and the Iowa General Assembly regarding public access to legislative e-mail communications. Disputes shall be heard in the District Court of Polk County. If jurisdiction regarding access is determined not proper in the Polk County District Court, actions shall only be brought in the United States District Court for the Southern District of Iowa, Central Division, provided that jurisdiction is proper in that forum.

The DRAFT contract shall additionally contain provisions providing for agreement on the part of the bidder that to its knowledge, neither the staff of the LSA nor a member of the General Assembly of the State of Iowa has or will receive any direct economic benefit because of the selection of the bidder as a party to the contract, that the bidder agrees that it has no interest and will not acquire any direct or indirect interest which would conflict in any manner with the performance of the contract, and that a person having such an interest will not knowingly be associated in the performance of the contract. The DRAFT contract shall further recognize that Iowa Code Chapter 68B contains restrictions which prohibit gifts that may be given or received by state employees and requires certain individuals to disclose information concerning their activities with state government. Bidders are



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responsible for determining the applicability of this chapter to their activities and for complying with these requirements.

The LSA will be free of any obligation to reimburse any unsuccessful contractor for expenses incurred or for work performed in anticipation of a contract.

No contract awarded, pursuant to a proposal submitted in response to this RFP, may be assigned either in whole, or in part, without first receiving formal consent from the LSA. Any attempted assignment, either in whole, or in part, without such consent shall be null and void, and in such an event the LSA shall have the right, at its option and without penalty, to terminate the contract.

L. Terms of Withdrawal

All proposals shall be firm offers and may not be withdrawn for a period of one hundred twenty days following the month submitted.

M. Right of Rejection

Notwithstanding any other provision of this RFP, the LSA reserves the right to reject any or all proposals and to waive any informality in a proposal.

V. CONTENT OF PROPOSALS

The purpose of this section is to identify the information that shall be submitted in response to this RFP as well as the order in which it shall appear in the proposal.

Each proposal shall be submitted in three separate sections. Section I shall be identified as the "Technical and Managerial Proposal." Section II shall be identified as the "Financial Proposal." Section III shall be identified as the "General Requirements."

Each page (excluding charts and drawings) shall be typed double-spaced using a font no smaller than Arial 12 point. Typed material shall not be subject to photo-reduction.

A. Section I — Technical and Managerial Proposal

1. Cover Letter (1-Page Limitation)

Section I shall contain a cover letter, which will include the company name and address, and the name and telephone number of the person or persons who will be authorized to represent the bidder regarding all matters related to the proposal and any contract subsequently awarded to said bidder. This letter shall be signed by a person(s) authorized to bind the company to all commitments made in the proposal.

2. Table of Contents

The proposal shall have a table of contents that must identify the information set forth therein by sequential page number and section reference number.

3. Executive Summary (5-Page Limitation)

The executive summary shall be placed after the table of contents and shall provide an overview of the proposed system, the installation approach, project staffing, project schedules, and proposed interfaces with LSA personnel.

If subcontractors are to be used, a management structure shall be provided for each. The method for resolution of subcontractor disputes shall also be described in this summary.

4. Solutions, Products, and Services

The proposal must include all proposed products, services, and activities necessary to develop and implement the project. The bidder should address the solution specifications in the same order as presented in this RFP. The bidder should include language from the RFP in the form of a section heading to identify what proposal is being referred to.



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5. Work Plan by Task

An example project schedule shall be furnished, by phase, indicating the plan for accomplishing the design, development, implementation, acceptance testing, training, and any other support for the proposed project. If the LSA's participation is required, the contractor shall identify the tasks/sub-tasks which must be completed by the LSA's resources and identify, in relative terms, when they must be completed.

6. Project Schedule

A project schedule shall be furnished by the bidder showing the deliverables for each such task and the significant completion dates (days after contract start) for major tasks of the project. Appropriate review periods may be indicated.

7. Joint Ventures

Any proposal that is a joint venture must submit the qualification documentation requested herein for each member of the joint venture.

8. Subcontractors/Major Suppliers

The identification of each proposed subcontractor/major supplier, its tasks/products, schedule, etc., shall be included. The form and content of all subcontractor/major-supplier-provided deliverables shall be described in detail.

B. Section II — Financial Proposal

A complete cost proposal, showing equipment and materials, installation services man-hours at standard and premium rates, and other costs shall be submitted for all features and services listed as Solution Specifications in this RFP.

Any special pricing, switching cost grants, introductory offer, buyback, or other incentive pricing shall be detailed in the cost proposal. All costs shall be the contract price offered to the LSA for the complete solution, including materials, software, equipment, or services.

The LSA will have the option of using this pricing for five full years following the execution of the contract with the option, at the LSA's discretion, of renewing the contract for up to five additional years on the same terms and conditions as the original contract. At any time the awarded bidder reduces the price for the solution to another governmental or commercial entity, such reductions shall have an immediate downward impact on the pricing included in this agreement. During the initial five-year term of this agreement, the price of the solution shall not increase and any contract extension will only allow for a price increase that is tied to the Consumer Price Index.

VI. GENERAL REQUIREMENTS

For a proposal to be considered responsive, all requested information described in this RFP must be included.

A. Ability of Solutions to Meet Technical Requirements

The bidder must exhibit a sound understanding of this RFP. The bidder must exhibit a thorough knowledge of each task required and the task's relationship to the objectives. The compliance with technical requirements, estimate of resources, man-hours, and service classes are factors in establishing the degree of understanding.

The bidder must identify foreseeable problem areas and indicate familiarity with the detailed aspects of the problems each task presents. The level of detail described and associated costs for each task and problem area will provide insight into the bidder's understanding of this RFP.

The bidder must identify and justify the actions recommended to solve specific problem areas and indicate that the system implications of the proposed solutions have been thoroughly considered.



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The adequacy of the specifications will be evaluated with respect to meeting the specific needs of the RFP, and the requirements articulated in the Solution Specification section. The technical capabilities, overall reliability, sustainability and life of the system, and simplicity of approach are factors in determining the viability of the proposed system(s).

B. Capabilities of Organization and Personnel

The LSA considers the organization to be the bidder and any subcontractor(s) or vendor(s) included in the proposal. Consideration will be given to the perceived level and degree of the bidder's responsibility, motivation, dedication to a successful effort, and to the overall capability of the contractor.

The bidder's history, financial stability, core competency, expected growth, past performance on similar size projects, and reputation will also be considered.

The evaluation team will also consider the experience, educational background, and availability of the personnel to be assigned to the project. Consideration will be given primarily for specific experience in the technical fields required to successfully implement the specific project and meet or exceed the requirements set forth in this RFP. Sufficient personnel must be provided to fulfill the project's objectives.

C. Ease of Implementation

Proposals will be reviewed based on the bidder's ability to provide a solution which minimizes the interruption to the LSA's systems and processes. Ease of implementation, degree of work required by the LSA, and details relative to various implementation scenarios will be considered. The bidder's history and past performance relative to successful implementation of similar solutions will also be considered.

D. Financial Proposal

The LSA will select in its sole discretion the proposal that appears to be in its best interest. Matters other than financials will also be considered in determining the award.

VII. PROHIBITION OF COMMUNICATION DURING RFP EVALUATION PERIOD

Bidders shall not initiate communication in any manner with the LSA personnel regarding this RFP or the proposals during this period of time, unless authorized, in advance, by the Director of the LSA. Failure to comply with this requirement may automatically terminate further consideration of that bidder's proposal(s).

VIII. PROPOSAL EVALUATION AND EVALUATION CRITERIA

After receipt of a proposal, but prior to award of any contract, the LSA, at its sole discretion, may require any or all bidders to submit additional information and/or to meet in person with LSA personnel.

Failure of a bidder to specifically respond to each RFP item, or any other information requested by the LSA, shall be grounds for rejecting that bidder's proposal.

The LSA, at its option and in its sole discretion, may reject any and all proposals submitted in response to this RFP, or waive any informality in a proposal when to do so would be to the advantage of the LSA. The LSA shall not be responsible for any irregularity or failure arising out of this RFP or selection of one or more successful proposals.

The successful proposal(s) will not necessarily be those that set forth the lowest price. The proposal must contain sufficient information that will establish the viability of the bidder's work plan. The LSA must be assured that, when completed, the new solution will meet or exceed the specifications identified in this RFP.



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Proposals will be evaluated by a Proposal Review Committee composed of representatives from the LSA, and possibly other entities. The Proposal Review Committee will review all responsive proposals for the features and services sought for the Solution Specifications listed in this RFP. Proposals will be screened by the Director of the LSA before moving to the review committee. This screening procedure will be used to insure the proposals have included all the necessary documentation, followed the specified format, and have a pricing model that is in the best interest of the LSA.

The Proposal Review Committee will finalize the selection by rating Finalists' proposals based on the following Evaluation Criteria. The result of this evaluation step will be the Committee's recommendation for a new system.

Proposals will be evaluated based on the following criteria:

<u>Evaluation Criteria</u>	<u>Points</u>
Ability of Solutions to meet Technical Requirements	35
Capabilities of Organization and Personnel	15
Project Schedule and Ease of Implementation	15
Financial Proposal	35

IX. AWARD OF CONTRACT

A. Contract Award Recommendation

After the evaluation of the proposals has been completed, the Director of the LSA will authorize negotiation of the contracts.

B. Resulting Contract

The bidder to whom a contract is awarded shall be required to enter into a written contract with the LSA. All work assigned to the bidder under a resulting contract will be subject to available funding, and no minimum level of work or funding is guaranteed.

C. Term of Contract

The initial term of a contract resulting from this RFP shall be five years. The LSA may, at its sole discretion, extend the initial term of the resulting contract under the same terms and conditions for up to five years upon written notice two months prior to the ending date of the initial term or any extension thereof.



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SaaS Collaboration, Office Productivity & E-mail Solution (COPE) Project					
RFP Bidder Checklist					
COMPLETION IS REQUIRED & THE ORDER & CONTENT OF THIS DOCUMENT SHOULD NOT BE ALTERED.					
Functional Requirements - Please indicate if your solution meets these requirements. If the solution does not meet all of the requirements, it is still possible to be successful.					
Item	Area	Description	Included (Yes/No)	If No to Column D Please Give the Date to be Included or State No Inclusion Intended	If the capability is included, then answer whether the capability is available "Out of the Box," "Via Configuration," or "Via Development and Customization"
1	E-mail	Basic e-mail functionality, including send, receive, format and attachments			
2	E-mail	Ability to create user-defined e-mail groups			
3	E-mail	Ability to create user-defined personal folders			
4	E-mail	Ability to search user-defined e-mail groups based on search criteria			
5	E-mail	Ability to search user-defined personal folders and contents based on search criteria			
6	E-mail	Ability to define rules for e-mail handling			
7	E-mail	Ability to add both personal signatures and notes			
8	E-mail	Ability to push contact lists and web links to mobile devices			
9	E-mail	Ability to retain e-mail (List per-user limit, if any)			
10	E-mail	Ability to copy, move, and store information to desktop or local storage			
11	E-mail	Ability to print stored information locally			
12	E-mail	Ability to scan or fax from multifunction devices to e-mail			
13	E-mail	Ability to establish remote printing to a designated facility			
14	E-mail	Ability to send, assign, and delegate tasks			
15	E-mail	Ability to utilize e-mail system remotely			
16	E-mail	Ability to delegate e-mail functionality to another staff member (i.e., proxy assignments, including mail/phone, appointments, reminder notes, tasks, etc.)			
17	E-mail	Ability to define proxy access limitations (e.g., Read/Write; Subscribe to Alarms and Appointments, Modify Options, Rules, and Folders)			
18	E-mail	Ability to retract and/or retrieve within e-mail system			
19	E-mail	Ability to use native applications to view attachments (MS Office, Adobe, QuickTime and Flash)			
20	E-mail	Ability to undo (i.e., formatting, delete, copy/paste, etc.)			
21	E-mail	Ability to use List serve capabilities			
22	E-mail	Ability for migrated e-mails to maintain header information including sender, recipient, date/time, cc:, bcc:, attachments, etc.			
23	Contact Mgmt	Basic contact management functionality, including but not limited to last name, first name, middle initial, department, title, business address, mailing address, multiple phone contacts, e-mail address, contact log, notes, categorization, etc.			
24	Contact Mgmt	Ability to synchronize contact information with desktop applications			
25	Contact Mgmt	Ability to synchronize contact information with industry standard mobile devices			
26	Contact Mgmt	Ability to share contact lists			
27	Contact Mgmt	Ability to use contacts to initiate phone call; integrated call control using Java Telephony API (JTAPI)			
28	Calendar	Basic calendaring functionality, including but not limited to appointment, event, and sharing			
29	Calendar	Ability to view multiple calendars at same time (both personal and global)			



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30	Calendar	Ability to schedule resources, including facilities, conference rooms, and equipment management			
31	Calendar	Ability to manage resources by proxy (e.g., delegate calendar management, set "view only" or "edit" rights to another staff member			
32	Calendar	Ability to print calendars locally in standard formats (such as daily, weekly, monthly, Franklin format, etc.)			
33	Calendar	Ability to view and schedule from "free-busy" information			
34	Calendar	Ability to categorize event			
35	Calendar	Ability to Import/Export Calendars			
36	Calendar	Ability to easily add new attendee to existing event			
37	Calendar	Ability to manage priority of event			
38	Calendar	Ability to view or hide appointment details			
39	e-Discovery	Ability to search based on the following criteria:			
40	e-Discovery	Content			
41	e-Discovery	Sender and/or Recipient			
42	e-Discovery	Date Range			
43	e-Discovery	Metadata			
44	e-Discovery	Ability to store search results with any metadata			
45	e-Discovery	Ability to add and delete from search results to create an e-Discovery set			
46	Archive and Backup	Ability to store and retrieve all live e-mail data for a minimum of 180 days: 90 days available to user and 90 additional days available to system administrators before data is automatically processed for long-term archive			
47	Archive and Backup	Ability to archive data based on content, sender, recipient, and/or other metadata with different archival periods per designated policy or legal requirements			
48	Archive and Backup	Ability to retrieve or e-Discover archived data based on content, sender, recipient, and/or other metadata with different archival periods			
49	Archive and Backup	Ability to view and perform all normal e-mail functions on archive by an e-mail administrator without having to restore			
50	Archive and Backup	Ability to restore archived e-mail data to "live" status			
51	Collaboration	Ability to share data and files stored within the solution			
52	Collaboration	Ability to have multiple individuals work on common files at the same time from different or separate work locations			
53	Collaboration	Ability to collaborate with staff members that are telecommuting or otherwise away from a facility			
54	Collaboration	Ability for users to track changes on shared or common files			
55	Collaboration	Ability to maintain version control (i.e., who, when, what)			
56	Collaboration	Ability to recover or revert to prior versions			
57	Collaboration	Ability for administrators to control the creation of collaboration sites at the individual user level			
58	Solution Administration	Fully manage all accounts within the network, including but not limited to addition, deletion, manipulation, suspension, and termination			
59	Solution Administration	Fully manage SaaS identity and user accounts			
60	Solution Administration	Control spam or provide anti-spam			
61	Solution Administration	Control virus or provide anti-virus, including spyware			
62	Solution Administration	Apply content filter			



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63	Solution Administration	Apply policies in managing solution			
64	Solution Administration	Review restricted e-mail			
65	Solution Administration	View all calendars and appointments			
66	Solution Administration	Print historical, statistical, and usage reports locally			
67	Solution Administration	Prioritize e-mail accounts			
68	Solution Administration	Manage attachment size			
69	Solution Administration	Set up mail routing			
70	Solution Administration	Manage multiple separate Global Address Lists (GALs)			
71	Solution Administration	Use "Whitelist," "Blacklist," and aliases			
72	Solution Administration	Perform e-Discovery functions (search, retrieve, manipulate search results, etc.) on all accounts within an EGE's domain			
73	Solution Administration	Ability to use a variety of domain names used within governmental entities as e-mail extensions			
74	Solution Administration	Ability to synchronize e-mail identities with identities that are managed in our internal authentication directory			
75	Solution Administration	Ability to control BlackBerry, Treo, iPhone, and other such mobile/smart devices, with, at a minimum, calendar, contacts, and e-mail functionality (e.g., BlackBerry Enterprise Server, etc.)			
76	Solution Administration	Set e-mail storage limits per user based on maximum storage limits that are set by the governmental entities			
77	Solution Administration	Ability to integrate with internal applications using e-mail, specifically using SMTP, IMAP, SOAP, POP3, etc.			
78	Solution Administration	Ability to manage DNS			
79	Solution Administration	Migrate historical or user archives from the current proprietary format to proposed solution after implementation			
80	Solution Administration	Ability to administer the solution in a distributed manner to different governmental entities			
81	Solution Administration	Set automatic settings for auto archive, auto delete, etc.			
82	Office Productivity	Word processing capability			
83	Office Productivity	Spreadsheet capability			
84	Office Productivity	Mid-tier database			
85	Office Productivity	Presentation tool capability			
86	Office Productivity	Ability to read, open, edit, and display standard Microsoft Office product formats (minimum version 2000)			
87	Office Productivity	Ability to migrate historical documents, spreadsheets, presentations, and databases			
88	Instant Messaging	Internal messaging			
89	Instant Messaging	External messaging			
90	Instant Messaging	Ability to track IM			
91	Instant Messaging	Ability to filter IM			
92	Video Conferencing	One-to-one internally and externally			
93	Video Conferencing	Multiple locations internally and externally			
94	Video Conferencing	Ability to provide real-time, on-screen notation			



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95	Video Conferencing	Ability to provide remote desktop access/control during video conference			
96	Video Conferencing	Provide tracking options			
97	Video Conferencing	Ability to record			
98	Virtual Drives	Ability to store files (all types) and work as a virtual drive on the PC desktop/laptop and with the operating system file manager			
99	Virtual Drives	Ability to search (e-Discovery) virtual drive files			
100	Virtual Drives	Ability to utilize local and SaaS office productivity tools			
101	Virtual Drives	Ability to track Virtual Drives			
102	Unified Communications	Ability to utilize "TTY" communication			
103	Unified Communications	Ability to receive voice mails into an e-mail account			
104	Security	Does the Offeror conduct pre-employment checks, including criminal, credit, etc.			
105	Security	Does the Offeror have security, access, privilege, and compliancy training in place for new and contracted staff			
106	Security	Does the Offeror have security, access, privilege, and compliancy training in place for existing staff			
107	Security	Does the Offeror have policies and procedures in place for security controls			
108	Security	Does the Offeror have a test, development, and production environment for the solution proposed			
109	Security	Does the Offeror have policies and procedures in place for removable media, destruction, and chain of commands			
110	Security	Does the Offeror have policies in place that cover the security of all third-party applications and services that are part of the proposed solution			
111	Security	Will the Offeror share its security controls with SIPA, upon request, such as scan detection, PVLAN usage, operation network separation, null routing, ARP poisoning, spanning tree config, etc.			
112	Security	Will the proposed solution allow for communication to be encrypted for all services from the client site			
113	Security	Does the solution support multi-factor authentication			
114	Security	Does the Offeror have documented procedures which indicate priority responses in case of multiple issues, such as a security incident during an outage and troubleshooting another system while implementation of another system			
115	Security	If multiple issues occur, will the Offeror have a priority and guaranteed response for this solution and its tenets			
116	Security	Will the Offeror share its security incidence response procedures and policies with SIPA upon request			
117	Security	Will the Offeror allow SIPA or its designee to run scripts, tools, scans, and penetration tests on the environments at any time			
118	Security	Will the Offeror allow SIPA or its designee to run scripts, tools, scans, and penetration tests on the environments with advance notice			
119	Security	Will the Offeror share its SAS-70 scope upon request with SIPA			

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