

# Solicitation Q0010058

## Microsoft Migration



Utah Valley University

## Bid Q0010058 Microsoft Migration

Bid Number Q0010058  
Bid Title Microsoft Migration

Bid Start Date Feb 16, 2011 3:51:42 PM MST  
Bid End Date Mar 14, 2011 2:00:00 PM MDT

Bid Contact Brandon Thomas  
Associate Director - Purchasing Operations  
Procurement Services  
thomasbr@uvu.edu

Contract Duration One Time Purchase  
Contract Renewal Not Applicable  
Prices Good for 30 days

Bid Comments The purpose of this Request for Proposal (RFP) is to solicit proposals to enter into a contract with a qualified supplier to obtain solutions related to a migration from Novell products to Microsoft products for Utah Valley University, hereafter referred to as the "University". The University is examining several alternatives of providing these products and services and may decide, after reviewing proposals submitted, not to enter into any agreement.

This document constitutes a Request for Proposal (RFP), via competitive sealed proposals, from qualified individuals or organizations to perform the Scope of Work set forth herein. This request is an offer by Utah Valley University to purchase, in accordance with the terms and conditions of this RFP, the services and products proposed by the successful firm. Firms are strongly encouraged to carefully read the entire request for proposal.

### Item Response Form

Item Q0010058--01 - RFP for Microsoft Migration  
Quantity 1 each  
Prices are not requested for this item.  
Delivery Location Utah Valley University  
Utah Valley University  
500 W 1200 S  
Orem UT 84058  
Qty 1

**Description**  
RFP for Microsoft Migration

### CLAIM OF BUSINESS CONFIDENTIALITY

Pursuant to Utah Code Ann., Subsections 63-2-304(1) and (2), and in accordance with Section 63-2-308,  asserts a claim of business confidentiality to protect the following information submitted as part of a Request for Proposal.

This claim is asserted because this information requires protection as it includes:

- € Trade secrets as defined in Section 13-24-2
  - “Trade secret” means information, including a formula, pattern, compilation, program, device, method, technique, or process, that: (a) derives independent economic value, actual or potential, from not being generally known to and not being readily ascertainable by proper means by other persons who can obtain economic value from its disclosure or use; and (b) is the subject of efforts that are reasonable under the circumstances to maintain its secrecy.
  
- € Commercial information or non-individual financial information obtained from a person if: (a) disclosure of the information could reasonably be expected to result in unfair competitive injury to the person submitting the information or would impair the ability of the governmental entity to obtain necessary information in the future; and (b) the person submitting the information has a greater interest in prohibiting access than the public in obtaining access.

This statement of reasons supporting the claim of business confidentiality applies to the following information in this proposal:

Page	Paragraph	Reason
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Please use additional sheets if needed.

You will be notified if a record claimed to be protected herein under Utah Code Ann. § 63-2-304 (1) and (2) is classified public or if the government entity determines that the record should be released after balancing interests under Utah Code Ann. § 63-2-201 (5)(b) or Utah Code Ann. § 63-2-401 (6). See Utah Code Ann. § 63-2-308.

Printed or Typed Name

Title

Signature

Date

**VENDOR REGISTRATION FORM**

Federal Employer's ID#  OR Social Security #   
Name of Organization   
Business Address   
City, State, Zip  Fax   
Main Contact Person  Phone   
Organization Structure (Please circle one)  
☐ 1. Individual ☐ 2. Partnership ☐ 3. Corporation  
☐ 4. Government Agency ☐ 5. Non-Profit Agency ☐ 6. Public Utility  
Small Business? ☐ Yes ☐ No  
Minority Owned Business? ☐ Yes ☐ No

Please describe below the major product(s) or service(s) provided by your company:

**DISCLOSURE STATEMENT**

Vendor must disclose any possible conflict of interest with Utah Valley State College, including, but not limited to, any relationship with any Utah Valley State College employee. Your response must disclose if a known relationship exists between any principal of your firm and any Utah Valley State College employee. If, to your knowledge, no relationship exists, this should also be stated in your response. Failure to disclose such a relationship may result in cancellation of a purchase and/or contract as a result of your response. This form must be completed and returned in order for your bid/proposal to be eligible for consideration.

☐ NO KNOWN RELATIONSHIP EXISTS

☐ RELATIONSHIP EXISTS (Please explain Relationship)

**I CERTIFY THAT:**

1. I, as an officer of this organization, or per the attached letter of authorization, am duly authorized to certify the information provided herein is accurate and true as of this date.
2. My organization shall comply with all State and Federal Equal Opportunity and Non-Discrimination requirements and conditions of employment.

Printed or Typed Name

Title

Signature

Date

Request For Proposal  
For Microsoft Migration  
RFP # Q0010058

Issued: February 16, 2011

Due Date: March 14, 2011

Utah Valley University  
Procurement Services  
800 W University Pkwy  
Orem, UT 84058

## Request for Proposal for Microsoft Migration

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## SECTION 1 – PURPOSE OF RFP

### 1.01. Purpose of RFP

The purpose of this Request for Proposal (RFP) is to solicit proposals to enter into a contract with a qualified supplier to obtain solutions related to a migration from Novell products to Microsoft products for Utah Valley University, hereafter referred to as the "University". The University is examining several alternatives of providing these products and services and may decide, after reviewing proposals submitted, not to enter into any agreement.

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### 1.02 About Utah Valley University

Utah Valley University is a teaching institution which provides opportunity, promotes student success, and meets regional educational needs. UVU builds on a foundation of substantive scholarly and creative work to foster engaged learning. The university prepares professionally competent people of integrity who, as life-long learners and leaders, serve as stewards of a globally interdependent community. Utah Valley University has about 1,400 full-time benefit eligible employees, 3,200 part-time employees and approximately 32,000 students.

## SECTION 2 – GENERAL INFORMATION

2.01. Administrative Guidance

The information provided herein is intended to assist firms in the preparation of proposals necessary to properly respond to this RFP. The RFP is designed to provide interested suppliers with sufficient basic information to submit proposals meeting minimum requirements. It is not intended to limit a proposal's content or to exclude any relevant or essential data therefrom. Firms are at liberty, and are encouraged, to expand upon the specifications to give additional evidence of their ability to provide the services/product requested in this RFP.

2.02. Issuing office and RFP Reference Number

Procurement Services of Utah Valley University (“Procurement Services”) is the issuing office for this RFP and all subsequent addenda relating to it. The reference number for the transaction is Q0010058. This number must be referenced on all proposals, correspondence, and documentation relating to the RFP.

2.03. Due Date

**In order to be considered for selection, your proposal must be received no later than 2:00 p.m. current Mountain Time on March 14, 2011.** Proposals received after this deadline will be late and ineligible for consideration. Utah Valley University will not be responsible for late delivery of improperly addressed envelopes. Following the deadline, the names of those responding to the RFP will be made public. All other information will remain confidential, as provided by law (please see section 2.15 hereof).

2.04. Pre-Proposal Conference

**No pre-proposal conference will be held.**

2.05. Inquiries

All inquiries or requests for clarification or interpretation arising subsequent to the issuance of this RFP that could have a significant impact on the responses to the RFP, should be submitted in writing through BidSync.com. Answers will be given via the BidSync site. Inquires that cannot be submitted through BidSync should be submitted in writing by e-mail to:

Brandon Thomas  
Procurement Services  
Utah Valley University  
[RFP@UVU.edu](mailto:RFP@UVU.edu)

Please include the RFP number in the subject line. Questions and answers will be consolidated and provided to all firms on record as having received this RFP. All inquiries must be received by February 23, 2011. Procurement Services will extend the due date if such information significantly amends this solicitation or makes compliance with the original proposed due date impractical.



2.06. Important Dates

The following dates are significant for this RFP:

RFP Dated and Issued	February 16, 2011
RFP Inquiry Questions Due	February 23, 2011
Proposal Due Date	March 14, 2011

2.07. Proposal Submission

The preferred method of submitting your proposal is electronically through BidSync.com. However, if you choose to submit hard copies, one original plus three copies of your proposal must be sealed and received at Utah Valley University, Procurement Services, 800 West University Pkwy, Room BA-109, Orem, UT 84058 no later than the due date.

Hard copies must be submitted in a sealed envelope and clearly marked with:

- A. Request for Proposal
- B. The proposal number
- C. Firm's name and address

When submitting a proposal electronically through BidSync, please allow sufficient time to complete the online forms and upload documents. The solicitation will end at the closing time listed in the RFP. If you are in the middle of uploading your proposal at the closing time, the system will stop the process and your proposal will not be received by the system.

Electronic proposals may require uploading of electronic attachments. BidSync's site will accept a wide variety of document types as attachments. However, the submission of documents containing embedded documents (zip files), mov, wmp, and mp3 files are prohibited. All documents should be attached as separate files.

2.08. Time for Evaluation

All proposals shall remain valid for a minimum of 90 calendar days after the Proposal Due Date to allow adequate time for evaluation.

2.09. Evaluation of Proposals

The University may award a contract based on initial proposals received without discussion of such proposals with suppliers. Accordingly, each initial proposal should be submitted with the most favorable price and service available. The University reserves the right to negotiate with any or all offering proposals, to reject any or all proposals, and to call for best and final offers after negotiations have concluded.

2.10. Oral Presentation

The University may require an oral presentation by a supplier to supplement their written proposal. These presentations will be scheduled, if required, by Procurement Services after proposals are received and prior to the award of the Contract.

2.11. Gratuities

By written notice to the firm(s), the University may disqualify from consideration or cancel any subsequent contract, if it is found by the University that gratuities, in the form of entertainment, gifts, or otherwise, were offered or given by the firm, or any agent or representative of the firm, to any officer or employee of the University with the intent to secure this contract or secure favorable treatment with respect to the awarding or amending of this contract.

2.12. Award of the Contract

Upon completion of the evaluation process, the University may award the contract ("Contract") to the firm whose proposal is determined to be most advantageous to the University. Procurement Services is the only agency authorized to award a Contract for the proposed purchases. All pertinent University policies and State of Utah purchasing codes and State procurement policies and procedures apply. Any contract resulting from this RFP will include, but not be limited to, UVU's terms and conditions and the applicable conditions outlined in this document.

2.13. Contract Period

The contract term will be from the date of award through completion of the project.

2.14. News Releases

News releases pertaining to the RFP, any proposal, or the Contract will be made only by the University.

2.15. Protected Information

State procurement rules, as well as the Government Records Access and Management Act, Section 63-2-101 et seq., Utah Code Ann. (1953), as amended ("GRAMA"), provides that **all** proposals may be disclosed to the public after notice of the selection of the successful firm(s) and after receipt of a GRAMA request. Any person (firm) who believes that a record should be protected as outlined in R-33-3-204.1, should complete the enclosed "Claim of Business Confidentiality" form. Failure to complete this form will result in the disclosure of your proposal if a GRAMA request is received. Pricing and service elements of any proposal will not be considered proprietary. All material contained in and/or submitted with the proposal becomes the property of the University and may be returned only at the University's option.

2.16. Incurring Costs

The University will not be liable for any cost which firms may incur in connection with the preparation or presentation of their proposal(s). Proposals should be concise, straightforward and prepared simply and economically. Expensive displays, bindings or promotional materials are neither desired nor required. However, these instructions are not intended to limit a proposal's content or exclude any relevant or essential data therefrom.

2.17. Addendum to RFP.

In the event that it becomes necessary to revise this RFP in whole or in part, an addendum will be provided to all suppliers on record as having received this RFP.

2.18. Other Communications

During the RFP process (from the date of issue through the date of contract award or other final decision) Procurement Services is the sole source of official information regarding this RFP. All other communications, both spoken and written, which are received by any representative of the firm from other sources (such as employees in the using department) should be confirmed by the firm with the buyer in Procurement Services assigned to this RFP as being true and accurate prior to incorporating such information into their response. This refers to both formal and informal conversations and communications. Significant changes to the RFP will always be issued as a formal, written addendum.

2.19. Alternative Proposals

A supplier may submit more than one proposal, each of which must follow the Proposal Response Outline (section 4.01 herein) and satisfy the requirements of this RFP. The supplier's

primary proposal must be complete and comply with all instructions. The alternative proposal(s) may be in abbreviated form following the Proposal Response Outline but providing complete information only for sections which differ in any way from those contained in the primary proposal. If alternative proposals are submitted, the supplier must explain the reasons for the alternative(s) and the comparative benefits. Each proposal submitted will be evaluated on its own merits.

2.20. Authorized Firm Representatives

The proposal will list the name, title, office address, telephone number, fax number and e-mail address (if available) of the person(s) authorized to represent the firm regarding this RFP. The University reserves the right to negotiate a change in the individual assigned to represent the firm awarded this contract if the assigned representative is not supplying the needs of the University appropriately. The right shall carry forward through the response period and during the term of the contract.

2.21. Award of Subcontracts

For each subcontract, if any, which the supplier proposes to award, the supplier shall specify in writing the proposed subcontractor's name and address, and the purpose of each subcontract. Any supplier proposing subcontracts as a part of a proposal must explicitly state so in the proposal. Written approval by Procurement Services is required prior to the awarding of any subcontracts. Any subcontractor shall be required to provide evidence to the University of the same insurance provisions and coverages as described in section 2.29 of this RFP.

2.22. Assignment

The firm shall not assign or subcontract any portion of its obligations under the Contract without the prior written consent of Procurement Services. Assignment or subcontracting shall in no way relieve the supplier of any of its obligations.

2.23. Remedies

The laws of the State of Utah shall apply in all disputes arising out of this RFP, without regard to Utah choice of law rules.

2.24. Compliance

The supplier hereby agrees to abide with all applicable federal, state, county and city laws and regulations and to be responsible for obtaining and/or possessing any and all permits and licenses that may be required.

2.25. Cancellation

Inadequate delivery, unsatisfactory service or failure to adhere to the Contract covenants may result in cancellation of the Contract. The firm shall be responsible for reimbursing the University for expenses incurred as a result of unacceptable service. In the event that either party determines that a material breach has occurred that would be cause for cancellation of the Contract, the party wishing to cancel shall notify the other party of the alleged breach in writing, and allow the other party thirty (30) days in which to cure the alleged breach. If the alleged breach is not cured or substantial steps to cure the alleged breach are not taken within this period, the non-defaulting party may cancel the Contract at the end of said thirty (30) day period.

2.26. Acceptance of Services Rendered.

The University, through its designated agents and representatives, will be the sole determining judge of whether services rendered under the Contract satisfy the requirements as identified in the Contract.

2.27. Anti-Collusion

The submission of a proposal constitutes agreement that the supplier has not divulged its proposal to, or colluded with, any other firm or party to a proposal whatsoever.

2.28. Indemnification

The firm shall hold harmless, defend and indemnify Utah Valley University and its officers, employees, and agents from and against any and all claims, losses, causes of action, judgments, damages and expenses including, but not limited to, attorney's fees because of bodily injury, sickness, disease or death, or injury to or destruction of tangible property or any other injury or damage resulting from or arising out of (a) performance or breach of this contract by the firm, or (b) the firm's use of University premises, or (c) any act, error, or omission on the part of the firm, or its agents, employees, invitees, participants, or subcontractors except where such claims, losses, causes of action, judgments, damages and expenses result solely from the negligent acts or omissions or willful misconduct of Utah Valley University, its officers, employees or agents.

2.29. Insurance

The firm shall maintain, during the term of any resulting contract, comprehensive General, Contractual, Professional and Errors and Omissions (E&O) Liability Insurance and Employee Dishonesty bonding coverage or such coverages as required by Federal, State, and local laws governing the services described herein. Proposers shall also maintain all employee-related insurances, in the statutory amounts, such as unemployment compensation, worker's compensation, and employer's liability, for its employees involved in performing services pursuant to any resulting underwriting contract. Such coverages may be self-funded.

2.30. Restrictions

All proposals must clearly set forth any restrictions or provisions deemed necessary by the firm to effectively service the proposed Contract.

2.31. Right to Reject

The University reserves the right to reject any or all proposals and to waive any informality or technicality in any proposal in the interest of the University.

2.32. Accounting

The firm must keep accurate accounting records of all operations covered by this RFP and is to establish and maintain a system of bookkeeping and accounting satisfactory to the University. The firm should be able to summarize and concisely report pertinent information in a timely manner through the duration of any contract resulting from this RFP.

2.33. Relationship of the Parties

In assuming and performing the obligations of any Contract, the University and any firm shall each be acting as independent parties and neither shall be considered or represent itself as a joint venturer, partner or employee of the other.

2.34. Equal Opportunity

No supplier of goods and/or services under this RFP or any Contract shall discriminate against any employee, applicant for employment, or recipient of services on the basis of race, color, religion, national origin, gender, pregnancy, childbirth, pregnancy-related conditions, age, disability, veteran status, genetic predisposition, or otherwise provided by state and federal law.

2.35. State and Local Taxes

The University is exempt from State of Utah sales and excise taxes (State of Utah Sales Tax Exemption number: 11843640-002-STC). Exemption certification information appears on all purchase orders issued by the University and such taxes will not apply to the University unless otherwise noted.

2.36. Payment and Performance Bonds

The University reserves the right to require a faithful performance bond in an amount to be mutually agreed upon if a contract for service is entered into with any agency.

2.37. Price Reduction

If at any time after the award of a contract, the successful firm reduces the price of any article or service covered under the contract resulting from this RFP, the successful firm shall give the University proportionately reduced pricing for such articles or services.

2.38. Solicitation of Employees

The selected firm and the University agree not to solicit each other's employees for a period of 2 years following completion of contract.

2.39. Debarment

The Contractor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction (contract), by any governmental department or agency. If the Contractor cannot certify this statement, attach a written explanation for review.

2.40. Status Verification System

If a Contract is awarded through this RFP for the physical performance of services within the State of Utah, supplier or supplier's agent, contractor, subcontractor or service provider is required to register and participate in the Status Verification System (E-verify) to verify the work eligibility status of Supplier's or Supplier's agent's, contractor's, subcontractor's or service provider's employees hired on or after July 1, 2009 and employed in the State of Utah, in accordance with UCA Section 63G-11-103.

## SECTION 3 – SPECIFICATIONS

*Note: All companies must respond to section 2 and 3 of this RFP and all other sections appropriate to the product(s)/services(s) being offered. When a section does not request specific information and you agree to what it contains, you may use language such as, "Understood and Agreed," in your response. Refer to Section 4.01 for instruction on how to compile your response.*

### 3.01. Background Information

Within the next few months, Utah Valley University (UVU) will change its faculty/staff collaboration and email/collaboration system from Novell GroupWise to Microsoft Exchange, and from Novell NetWare file servers to SharePoint and CIFS-based technologies. At the same time, UVU will implement an archiving solution for the new systems to enhance performance of the Exchange, SharePoint, and CIFS systems, and to provide users with an alternative to using .PST files. UVU is seeking proposals from qualified service providers and software/hardware vendors to provide solutions and consulting.

UVU uses a proprietary Identity Management (IDM) system to provision all user accounts, both for employees and students. Employee users automatically receive a collaboration account, whereas students generally do not. Faculty and staff have access to file systems, with rights to access directories based on roles (group memberships). UVU currently has around 6,000 faculty, staff, and generic accounts, with between 3,000 and 4,000 actively used.

UVU's project to migrate from Novell technologies to Microsoft technologies is expected to take one year, beginning January 2011. UVU will migrate one department or group at a time, requiring both Novell and Microsoft systems to be online in parallel and to work together to ensure continuity of work between departments that have migrated and departments that have not.

UVU has in-house expertise and support for GroupWise, Exchange, SharePoint, Novell File Systems, and CIFS, as well as for the mobile devices to be supported. Our goal in seeking proposals is to engage solutions and consulting for a migration from Novell to Microsoft technologies, and to possibly implement an archive system that will work well with and be better or more cost effective than the archiving provided natively with Exchange 2010 and Sharepoint 2010. Solution proposals must take into consideration the variety of clients and access methods in use. While not every client method must be supported with full functionality, the more options available, especially on the Windows and Mac OSX client platforms, the more beneficial the product will be to UVU.

### 3.02. Summary

This Section of the RFP is broken into five sub-sections (3.03 - 3.07). The first sub-section is related to Vendor Information, which will help us understand the solution provider. All respondents should respond to the questions in this sub-section. The next three sub-sections relate to the technology and/or solution proposed. Respondents need not provide a response for all of these sub-sections, but only for those sub-sections for which their products and solutions are designed. The three sub-sections are: Exchange Migration, Archiving, and File System Migration. Each of these three sub-sections will be evaluated separately and we will select the best solution from each sub-section, or no solution at all, based upon our budgetary constraints and the responses to our requirements. The final sub-section allows respondents to provide additional information about other products and services proposed (at no additional cost), and to describe how their combination of solutions can provide additional value or cost savings to UVU.

### 3.03. Vendor Information

Please respond to the following as related to both your overall company and any individual business units related to the products and services requested in this RFP.

- A. Describe your company's ongoing (past and future) relationship with UVU.
- B. How many years have you been in business?
- C. Describe your vision, strategy and long-term roadmap.
- D. Describe how services will be provided. Do you have a service arm?
- E. What partnerships do you have with other companies that might be meaningful in the context of this RFP?
- F. What is your approach to product development and what is your process for product enhancements?
- G. Describe your support offerings, including any SLAs.
- H. How many clients do you have, and how many are similar in size to UVU?
- I. Please provide qualified references, particularly those in higher education.
- J. Describe endorsements of your products by industry analysts, consultants, and other independent sources.
- K. Describe your market penetration and geographic reach.
- L. How many people do you employ?

### 3.04. Exchange Migration

UVU uses Novell GroupWise versions 7.0.1 through 7.0.4 for clients on Windows and Mac OS X, and version 7.0.4 for servers on NetWare 6.5 SP8 and SUSE Linux Enterprise Server (SLES) version 10. In addition, many users run alternate client software using the POP and IMAP protocols, as well as using the GroupWise WebAccess client. Further, a variety of mobile devices are used (usually as a secondary method) to access collaboration information using GroupWise Mobile Server, Blackberry Enterprise Server, and NotifyLink OnDemand Service.

UVU's Microsoft Exchange system will be based on Exchange 2010 running on Windows Server 2008 R2. In addition to Microsoft Outlook on Windows and Mac OS X, it is expected that many users will access the Exchange system from a variety of client software on a variety of desktop platforms, including Windows XP, Windows 7, Mac OS X, and various flavors of Linux/Unix, and some will wish to access Exchange using web-based client technologies as well. The variety and number of mobile devices requiring support on the Exchange system will likely increase over the current level for a variety of reasons.

UVU currently does no system-level archiving of data, emails, etc. An estimated 100 users have elected to create a GroupWise archive on their local machines for their own archiving purposes. It is expected that these local GroupWise archives will be migrated to the new Exchange system using whatever methodology is best, given the migration platform chosen.

UVU has chosen not to use an archive methodology for the migration from GroupWise to Exchange. We are aware that archiving is a best practice, but after extensive discussion of the issues, we feel our users will be less impacted by moving all content into Exchange directly. Our current retention of GroupWise data is limited to 135 days within the system, so the amount of

data to migrate is not exorbitant. Individual user archives will contain data for an extended period of time, but the number users who have large amounts of data is relatively small.

Respondents to this sub-section of the RFP should propose any software and services intended to facilitate the migration from GroupWise to Exchange. Please also propose any proprietary hardware that is required.

Please respond to the following questions and requests:

- A. Describe the solution's support for UVU's server and client OSes and email systems.
- B. Describe the hardware requirements for the solution.
- C. Describe the processes required to install the solution remotely and the suitability for remote users.
- D. Describe the deployment processes performed both by your service team and by UVU's IT team.
- E. Describe the scalability limits, steps required for expansion, and other issues related to scalability.
- F. Describe the load balancing features of the solution.
- G. Provide performance/stress test results for the solution, including performance variations as the amount of data increases.
- H. Describe modifications or settings required within the GroupWise and/or Exchange systems to ensure all data (email, calendar items, etc.) is migrated to the Exchange 2010 system in a timely way.
- I. Describe the system's integration with directory systems for security and centralized management functions.
- J. Describe the system's database dependencies.
- K. Describe the hardware and software architecture of the system.
- L. Describe the system's empowerment of users to migrate messages and other data (including locally stored GroupWise archives) without administrator/IT involvement.
- M. Describe the process by which the system functions. What parameters can be used to select messages and other data to migrate (to/from email address, subject line, attachment name/contents, etc.)?
- N. Describe the system's ability to migrate a single message or an entire mailbox, based on user preferences.
- O. Describe the access controls and permissions of the system. Can permissions be assigned so that an administrator or assistant can migrate another users' content?
- P. Describe reporting capabilities of the system. Does the solution provide reporting of the migration of individual users and/or the entire organization?
- Q. Describe the error logging capabilities of the system. What types of error logging are provided by the solution and are there configuration options available? Is a log provided as messages, attachments and other content are migrated?
- R. Describe your migration methodology.



- S. Detail why your migration methodology is preferable to any other methodologies.
- T. Describe the steps and timeframes involved in a migration from a fully functional GroupWise system to a fully functional Exchange system.
- U. Detail the amount (as a percentage of the whole) of all email and collaboration data and files that will be transferred using your process.
- V. Detail the tools you recommend using to assist in the preparation, migration, and post-migration processes.
- W. Detail the process to recreate all of our mailboxes, address books, distribution groups, memberships, etc. How will this work in conjunction with our Identity Management System which will automatically create many/most of these objects?
- X. Describe the way UVU will get help when there are issues with the migration and the period of time it will take to help us in an emergency.
- Y. Describe the impact to end users for this migration to happen using your methodology.
- Z. Describe how each of the following will be migrated:
  - i. All mail, appointments, tasks, and notes
  - ii. User archives from various archive locations
  - iii. Address books, personal contacts, etc.
  - iv. Proxy rights
  - v. Rules
  - vi. Distribution lists
  - vii. Future / Recurring appointments
  - viii. Shared folders, calendars, contacts
- AA. Describe how the migration can be done during business hours and any reasons it should be done during off hours.
- BB. Detail the most time-consuming parts of the migration.
- CC. Describe the end-user training necessary for the migration - do not include basic Outlook training.
- DD. Describe the physical and Internet based access to UVU's site that will be required by your personnel.
- EE. Describe the preparation work UVU will need to do.
- FF. Describe the typical transition process from the GroupWise to Exchange 2010.
- GG. Describe the transition period of having both systems online concurrently.
- HH. Describe the process you would recommend to minimize the risk of data loss.
- II. How long has your migration product been on the market?
- JJ. Detail your company's competencies on GroupWise 7 and Exchange 2010.
- KK. Describe how well your company can execute a migration for UVU.

- LL. Is UVU using other solutions from your company that might need to be integrated with this solution?
- MM. Describe your experience with migrating collaboration systems from GroupWise 7 to Exchange 2010.
- NN. Will your product re-address all items to simplify the ability to reply to items received in GroupWise, which have been migrated to Exchange?
- OO. How does your solution mitigate the fact that single instance storage is lost with Exchange 2010?

### 3.05. Archiving

We are interested in solutions that provide archiving capabilities for Exchange, SharePoint, and CIFS shares. UVU's CIFS shares will likely be provisioned on a NetApp filer, but could also be housed on a Server 2008 R2 host. Therefore, solutions supporting these platforms would be of additional value, depending upon our final decisions about their use and budgetary constraints. Clients of the archiving system will be diverse. Windows XP, Windows 7, Mac OS X, and Linux, as well as many mobile and web platforms will likely need to access the archived data. Additionally, archived Exchange data should be available from Outlook clients on Windows and Mac OS X.

The built-in archiving solutions provided by Exchange 2010 and SharePoint 2010 are adequate for our needs, but we are interested in exploring other options that may reduce our costs and/or improve our functionality. Respondents may propose hardware, software, and/or services for the archiving solution. While most questions in this sub-section relate to software functionality, we are interested in learning about hardware platforms and other services that may improve our TCO, functionality, and ability to provide quality services to our users.

Our goal with archiving is to enhance the user experience, both through moving data out of our live systems, and through providing a method for users to save items they deem important for a longer period of time. Note that compliance issues and e-discovery are not our focus for this archiving system. Still, many questions in this section relate to enhancing our ability to meet compliance and e-discovery requirements. This is a secondary goal to reduce the workload on administrators for the occasional e-discovery requests we receive.

Please respond to the following questions and requests:

- A. Describe the solution's support for UVU's server and client OSes.
- B. Describe the solution's support for Exchange 2010, SharePoint 2010, and CIFS shares on NetApp filers, MS Windows File Servers, etc.
- C. Describe the solution's support for Exchange 2010, SharePoint 2010, and CIFS shares on NetApp filers, MS Windows File Servers, etc.
- D. Describe the platform models the solution supports (software, appliance, hosted, managed service, hybrid service).
- E. Describe the hardware requirements for the solution.
- F. Describe the processes required to install the solution remotely and the suitability for remote users.

- G. Describe the deployment processes performed both by your service team and by UVU's IT team.
- H. Describe the scalability and expansion limits, steps required, and other issues related to scalability and expansion, including the load balancing features of the solution.
- I. Provide performance/stress test results for the solution, including performance variations as the size of the archive increases.
- J. Describe modifications or settings required within each affected system to ensure all internally and externally originated data (email, calendar items, SharePoint, and CIFS) is captured by the system.
- K. Describe the system's flexibility for integration of new modules to address future needs.
- L. Describe the system's integration with anti-spam, anti-virus, anti-malware, data encryption, and other document retention systems.
- M. Describe the system's configuration and ability to capture email messages and data files generated by applications, such as CRM or ERP systems.
- N. Describe the system's support for identity-based / directory-based management.
- O. Describe the system's web-based client and management accessibility. List compatible browsers.
- P. Describe the system's storage in an industry-accepted standards-based format (XML, etc.), and its ability to be accessed via standards-based tools independent of the messaging or storage system.
- Q. Describe the system's retention of data independent of media and file structure.
- R. Describe the system's database dependencies.
- S. Describe the system's ability to limit database corruption due to archive size, and measures implemented to ensure this won't compromise the archived data.
- T. Describe the hardware and software architecture of the system.
- U. Describe the system's Single Instance Storage (SIS) capabilities.
- V. Describe the system's ability to perform properly in the event of a storage or server failure.
- W. Describe the system's integration with storage systems. Does the solution work with WORM, RAID, CD-ROM, NAS, SAN, tape systems and other storage media? What are the limitations, if any?
- X. Describe the procedures and backup tools required to back up the archived data.
- Y. Describe the system's ability to capture all message attributes of email and file system meta-data.
- Z. Describe the system's Information Lifecycle Management (ILM) functionality that allows for the creation of rules for minimum and maximum retention periods of time and cost optimization of the storage infrastructure.
- AA. Describe the system's ability to monitor storage capacity and alert administrators when previously established thresholds have been crossed.

- BB. Describe the system's behavior in a scenario where storage capacity for the archive is overrun.
- CC. Describe the system's empowerment of users to retrieve messages and other data without administrator/IT involvement.
- DD. Describe the users' abilities to categorize messages and other data manually in addition to automatic categorization by the archiving system.
- EE. Describe the datastore's ability to be searched across all folders and repositories simultaneously.
- FF. Describe the process by which the archive system is searched. What parameters can be used to search the archive (to/from email address, subject line, attachment name/contents, filename, meta-data, etc.)?
- GG. Describe the system's ability to retrieve a single message or other piece of data.
- HH. Describe the access controls and permissions of the system. Can permissions be assigned so that a user can have access to other users' archived content?
- II. Describe mobile device accessibility to the system.
- JJ. Describe reporting capabilities of the system. Does the solution provide reporting capabilities for data volumes for individual users and/or the entire organization?
- KK. Describe the error logging capabilities of the system. What types of error logging are provided by the solution and are there configuration options available? Is a log provided as messages, attachments and other content are added to the archive?
- LL. Describe the security model of the system. Are items secured in the archive at the object level, folder level, or group level?
- MM. Describe the visibility controls of the system. Can the solution present to users only archived data which they have permission to access?
- NN. Describe the system's granularity and integration with identity management for user, group, and public types of visibility, retrieval, and reporting.
- OO. Describe the audit control over access to archived data. Is the data in the archive tamper-proof and does the solution provide reports on who has accessed archived data and when it was accessed?
- PP. Describe how the system satisfies the requirements of the Federal Rules of Civil Procedure, FERPA, Sarbanes-Oxley, and HIPAA.
- QQ. Describe the system's ability to provide for the automatic flagging of messages/data for legal hold.
- RR. Describe the system's ability to add a policy per case for legal holds.
- SS. Describe the system's ability to allow items in the hold area to be searched.
- TT. Describe the system's ability to guide navigation through the search development process (wizards).
- UU. Describe the system's ability to allow search results to be ordered by sender, recipient, date, subject, relevance, and other fields.

- VV. Describe the system's ability to allow eDiscovery searches by attachment/document, message header properties, email policy applied to the message, file system meta-data, and to provide relevance ranking of results.
- WW. Describe the system's ability to allow search results to be exported to fully searchable platform-independent portable media.
- XX. Describe the system's ability to provide simple and complex search results to be returned in sub-second speed.
- YY. Describe the system's ability to allow a user who has been granted review privileges to perform certain actions on the archived data, and to allow for a fully searchable audit trail.
- ZZ. Describe the system's ability to notify administrators and users when a user's message store contains items that are older than default retention periods.
- AAA. How long has your archiving product been on the market?
- BBB. Describe how well your company can execute an archiving solution deployment for UVU.
- CCC. What actions will your company take if a government agency requests access to UVU's archived data? Does your company maintain attorney-client privilege? How does your company meet geographic legal requirements for user privacy or disclosure or preservation?
- DDD. Is UVU using other solutions from your company that might need to be integrated with this solution?
- EEE. How are shared folders, calendars, and address books handled?
- FFF. Describe the archive product's integration with Outlook on Windows and Mac OSX for stubbing, etc.
- GGG. Describe the procedure for an end-user to send an item (message, document, etc.) or group of items to the archive.

### 3.06. File System Migration

While Novell NetWare has served UVU well for more than two decades, it is time for a change. We are considering two alternative paths: 1) migrate all data from the current NetWare file systems to CIFS shares on our NetApp filer; and 2) migrate documents from current file systems to SharePoint, and other files (including application programs, databases, etc.) to CIFS shares. In either case, a complete reworking of the current rights model will be necessary, as the permissions model used by Microsoft would be extremely cumbersome and complicated to implement given our current file system hierarchies.

UVU currently uses 11 file servers (Novell NetWare 6.5 SP8), with between 3 and 5 volumes assigned to each. Each of the servers has one volume dedicated to home directories. All other volumes on these file servers are part of a hierarchical meta-volume that uses Novell's DFS technologies to allow a single drive mapping to provide access to all shared data. Rights are assigned via groups to various directory structures across these volumes to ensure that everyone has rights to what they are supposed to have, but nothing more. This hierarchical system places shared directories at a deep level of the tree structure, which would cause innumerable

management complexities were it to be copied to CIFS directly.

It is expected that using CIFS shares from our NetApp filer will require us to design our shared directories in a flat structure to simplify permission management. This change of design will be challenging to even design, let alone implement, due to the complexity of the current system. A solution to help us with this redesign and the migration of data would ease this burden.

In addition, the migration away from Novell technologies will necessitate the removal of all Novell products from thousands of desktop computers, along with their integration into the Active Directory structure. Profiles must be transitioned, permissions and roles must be enabled and enforced, and numerous products will need to be installed to facilitate a smooth, seamless migration for users. Most of UVU's current desktops employ Windows XP Professional, but a growing number are Windows 7 machines. We expect that during the migration, a large number of the machines currently running Windows XP will be re-imaged to Windows 7, with all the appropriate changes included. However, many others do not support Windows 7, or have applications that require Windows XP. These desktops will need a solution to make the changes necessary for the migration. A solution to accomplish this would be very desirable.

Please respond to the following questions and requests:

- A. Describe the solution's support for UVU's server and client OSes.
- B. Describe the solution's support for SharePoint 2010 and CIFS shares on NetApp filers, MS Windows File Servers, etc.
- C. Describe the hardware requirements for the solution.
- D. Describe the processes required to install the solution remotely and the suitability for remote users.
- E. Describe the deployment processes performed both by your service team and by UVU's IT team.
- F. Describe the scalability and expansion limits, steps required, and other issues related to scalability and expansion.
- G. Describe the load balancing features of the solution.
- H. Provide performance/stress test results for the solution, including performance variations as the amount of data increases.
- I. Describe modifications or settings required within each affected system to ensure all data is migrated from UVU's current file servers to SharePoint and/or CIFS.
- J. Describe the system's integration with anti-spam, anti-virus, and anti-malware systems.
- K. Describe the system's integration with data encryption systems (McAfee End-Point Security, TrueCrypt, etc.).
- L. Describe the access controls and permissions of the system. Can permissions be assigned so that a user can migrate other users' content?
- M. Describe reporting capabilities of the system. Does the solution provide reporting of the migration of individual users and/or the entire organization?
- N. Describe the error logging capabilities of the system. What types of error logging are provided by the solution and are there configuration options available? Is a log provided as files are migrated?

- O. Describe the process by which the system functions. What parameters can be used to select data to migrate?
- P. Describe the system's ability to migrate a single file or an entire volume, based on user preferences.
- Q. Describe your migration methodology.
- R. Detail why your migration methodology is preferable to any other methodologies.
- S. Describe the steps and timeframes involved in a migration from a Novell system to a SharePoint system.
- T. Describe the steps and timeframes involved in a migration from a Novell system to a CIFS share system.
- U. Detail the amount (as a percentage of the whole) of all shared and personal files that will be transferred using your process.
- V. Detail the tools you recommend using to assist in the preparation, migration, and post-migration processes.
- W. Detail the process to recreate all of our volumes, shares, folders, and files, as well as groups, and group memberships, etc. How will this work in conjunction with our Identity Management System which will automatically create many/most of these objects?
- X. Describe the way UVU will get help when there are issues with the migration and the period of time it take to help us in an emergency.
- Y. Describe the impact to end users for this migration to happen.
- Z. Describe how each of the following will be migrated:
  - i. Volumes
  - ii. Shares
  - iii. Folders
  - iv. Documents
  - v. Application Programs
  - vi. Groups
  - vii. Group Memberships
- AA. Describe the pros and cons of migrating in batch mode vs. one at a time.
- BB. Describe how the migration can be done during business hours and any reasons it should be done during off hours.
- CC. Detail the most time-consuming parts of the migration.
- DD. Describe the end-user training necessary for the migration.
- EE. Describe the physical and Internet based access to UVU's site that will be required by your personnel.
- FF. Describe the preparation work UVU will need to do.
- GG. Describe the typical transition process from the Novell to Microsoft SharePoint and CIFS shares.

- HH. Describe the transition period of having both systems online concurrently.
- II. Describe the process you would recommend to minimize the risk of data loss.
- JJ. How long has your migration product been on the market?
- KK. Detail your company's competencies on Novell NetWare, SharePoint, and CIFS.
- LL. Describe how well your company can execute a migration for UVU.
- MM. Is UVU using other solutions from your company that might need to be integrated with this solution?
- NN. Describe your experience with migrating from Novell NetWare to SharePoint and CIFS.
- OO. Describe the system's database dependencies.
- PP. Describe the hardware and software architecture of the system.
- QQ. Describe the system's Single Instance Storage (SIS) capabilities.
- RR. Describe the system's robustness and ability to perform properly in the event of a storage or server failure.
- SS. Describe the system's ability to capture and migrate all appropriate meta-data.
- TT. Describe the system's ability to monitor storage capacity and alert administrators when previously established thresholds have been crossed.
- UU. Describe the system's behavior in a scenario where storage capacity for the archive is overrun.
- VV. Describe the system's empowerment of users to migrate data without administrator/IT involvement.
- WW. Is UVU using other solutions from your company that might need to be integrated with this solution?
- XX. Describe the process of migrating a Windows PC.
- YY. Describe what is done during the automated portion of the migration of a Windows PC.

3.07. Other Products, Services, and Added Value

Please respond to the following as related to items not requested in this RFP:

- A. Please describe any products you intend to deliver that were not requested in the RFP, but that you feel add value to the solution you would provide.
- B. Please describe any services you intend to deliver that were not requested in the RFP, but that you feel add value to the solution you would provide.
- C. Please describe how you would add value to any solutions you have proposed by providing them in combination, or by combining proposed solutions with other solutions you hadn't previously proposed (e.g. with items 1 and 2 above).



## SECTION 4 – PROPOSAL RESPONSE OUTLINE

### 4.01. Proposal Response Outline

Proposals must be concise and in outline format. Pertinent supplemental information should be referenced and included as attachments. All proposals must be organized and tabbed to comply with the following sections:

#### A. LETTER OF TRANSMITTAL

The letter of transmittal should include an introduction of the firm's company, the name, address, telephone number, fax number and E-mail address of the person(s) to be contacted along with others who are authorized to represent the company in dealing with this RFP. Any other information not appropriately contained in the proposal itself should also be included in the letter.

#### B. EXECUTIVE SUMMARY

An executive summary will briefly describe the firm's approach and clearly indicate any options or alternatives being proposed. It should also indicate any major requirements that cannot be met by the firm.

#### C. DETAILED DISCUSSION

This section should constitute the major portion of the proposal and must contain **a specific response in outline form to each section in this RFP which requires a response. Outline numbers should correspond, in order, to the section numbers contained in this RFP.** Failure to provide written response to items indicated in this RFP will be interpreted by the University as an inability by the firm to provide the requested product, service or function.

#### D. REFERENCES

A list of your current customers should be provided. Additionally, at least five (5) references for customers which have received services similar to those required by the University are to be provided. Include business name, address, phone number and contact person for each reference. The University reserves the right to contact or visit any of the supplier's current and/or past customers to evaluate the level of performance and customer satisfaction.

#### E. COST PROPOSAL

The firm must submit a cost proposal allowing costs to be evaluated independently of other criteria in the proposal. Please enumerate on the attached Cost Proposal Form. Additional detailed information regarding cost should also be included.

#### F. MISCELLANEOUS

Additional information and attachments, if any may be submitted by the firm. The firm may be asked to furnish a current audited financial report for the company's most recent fiscal year.

## SECTION 5 – PROPOSAL EVALUATION

### 5.01. Evaluation Process

All proposals in response to this RFP will be evaluated in a manner consistent with Utah Procurement Code and all applicable rules and policies.

In the initial phase of the evaluation process, an evaluation committee will review all proposals received in a timely manner. The proposals will be opened so as to avoid disclosure of the contents to competing firms. All proposals will be held in strict confidence by those appointed to evaluate the proposals until the contract has been awarded. A register of the proposals will be made available to the public after the contract award.

The following procedure will be followed in the evaluation process:

- Non-responsive proposals (those not conforming to RFP requirements) will be eliminated first.
- The remaining proposals will be carefully evaluated to eliminate from further considerations those proposals which, in the judgment of the committee, fail to offer sufficient and substantive provisions to warrant further consideration.
- At the conclusion of this initial evaluation phase, finalist vendor proposals will be selected for detailed review and evaluation.

The University reserves the right, as provided by Utah state law, to negotiate with the finalists and to call for best and final offers. The award of the contract will be made based on the evaluation and recommendation of the committee after study of the best and final offers.

The contract will be awarded on the basis of a determination as to which offer will provide the optimum value to the University. A detailed proposal must accompany the response.

### 5.02. Evaluation Criteria

Each section (3.04 – 3.06) of the proposals will be evaluated in accordance with the following criteria:

- A. Ability of the solution to meet UVU's needs
- B. Vendor experience, references, and ability to perform
- C. Cost of proposed solution and services

The evaluation committee will also evaluate the added value of single vendor solution (section 3.07).

**SECTION 6 – COST PROPOSAL****RFP Q0010058  
Microsoft Migration**

<b>A. Exchange Migration</b>	<b>Unit Price</b>
Products	\$
Services	\$
<b>Subtotal</b>	<b>\$</b>

<b>B. Archiving</b>	<b>Unit Price</b>
Products	\$
Services	\$
<b>Subtotal</b>	<b>\$</b>

<b>C. File System Migration</b>	<b>Unit Price</b>
Products	\$
Services	\$
<b>Subtotal</b>	<b>\$</b>

<b>D. Value Added</b>	<b>Unit Price</b>
Products	\$
Services	\$
<b>Subtotal</b>	<b>\$</b>

**COST PROPOSAL SUMMARY****RFP Q0010058  
Microsoft Migration****6.02. Cost Proposal Summary**

The Cost Proposal Summary indicated below will be used solely for computing the cost as a fair and equitable formula to determine the bid price and are not binding on the University. In the event of computational error, the breakdown indicated in the Cost Proposal will prevail over extended totals indicated below.

<b>G. Summary of Subtotals</b>	<b>Cost</b>
Table A – Exchange Migration	\$
Table B – Archiving	\$
Table C – File System Migration	\$
Table D – Value Added	\$
<b>Total</b>	\$

## APPENDIX A – CLAIM OF BUSINESS CONFIDENTIALITY

Pursuant to Utah Code Ann., Subsections 63-2-304(1) and (2), and in accordance with Section 63-2-308,  
 \_\_\_\_\_ asserts a claim of business confidentiality

Company Name

To protect the following information submitted as part of a Request for Proposal.

This claim is asserted because this information requires protection as it includes:

- “ Trade secrets as defined in Section 13-24-2
  - “Trade secret” means information, including a formula, pattern, compilation, program, device, method, technique, or process, that: (a) derives independent economic value, actual or potential, from not being generally known to and not being readily ascertainable by proper means by other persons who can obtain economic value from its disclosure or use; and (b) is the subject of efforts that are reasonable under the circumstances to maintain its secrecy.
- “ Commercial information or non-individual financial information obtained from a person if: (a) disclosure of the information could reasonably be expected to result in unfair competitive injury to the person submitting the information or would impair the ability of the governmental entity to obtain necessary information in the future; and (b) the person submitting the information has a greater interest in prohibiting access than the public in obtaining access.

This statement of reasons supporting the claim of business confidentiality applies to the following information in this proposal:

Page	Paragraph	Reason

Please use additional sheets if needed.

You will be notified if a record claimed to be protected herein under Utah Code Ann. § 63-2-304 (1) and (2) is classified public or if the government entity determines that the record should be released after balancing interests under Utah Code Ann. § 63-2-201 (5)(b) or Utah Code Ann. § 63-2-401 (6). See Utah Code Ann. § 63-2-308.

\_\_\_\_\_  
 Printed or Typed Name

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 Signature

\_\_\_\_\_  
 Date

**APPENDIX B – VENDOR REGISTRATION FORM**

Name of Organization \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_  
 Main Contact Person \_\_\_\_\_  
 Phone Number \_\_\_\_\_ Fax Number \_\_\_\_\_  
 Taxpayer Identification Number \_\_\_\_\_

**Organization Structure (Please check one)**

☐ Individual ☐ Partnership ☐ Corporation  
☐ Government Agency ☐ Non-Profit Agency ☐ Public Utility

Small Business? (Y/N)

Minority Owned Business? (Y/N)

Please describe below the major product(s) or service(s) provided by your company:

\_\_\_\_\_  
 \_\_\_\_\_

**DISCLOSURE STATEMENT**

Vendor must disclose any possible conflict of interest with Utah Valley University including, but not limited to, any relationship with any Utah Valley University. Your response must disclose if a known relationship exists between any principal of your firm and any Utah Valley University employee. If, to your knowledge, no relationship exists, this should also be stated in your response. Failure to disclose such a relationship may result in cancellation of a purchase and/or contract as a result of your response. This form must be completed and returned in order for your bid/proposal to be eligible for consideration.

☐ NO KNOWN RELATIONSHIP EXISTS

☐ RELATIONSHIP EXISTS (Please explain Relationship)

**I CERTIFY THAT:**

1. I, as an officer of this organization or per the attached letter of authorization, am duly authorized to certify the information provided herein is accurate and true as of this date.
2. My organization shall comply with all State and Federal Equal Opportunity and Non-Discrimination requirements and conditions of employment.

\_\_\_\_\_  
 Printed or Typed Name

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 Signature

\_\_\_\_\_  
 Date

## Question and Answers for Bid #Q0010058 - Microsoft Migration

### OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.