

Solicitation Q42701

Enterprise Email and Messaging Solution



Weber State University

Bid Q42701

Enterprise Email and Messaging Solution

Bid Number **Q42701**
Bid Title **Enterprise Email and Messaging Solution**

Bid Start Date **Dec 28, 2011 12:20:58 PM MST**
Bid End Date **Jan 31, 2012 2:00:00 PM MST**
Question & Answer End Date **Jan 19, 2012 2:00:00 PM MST**

Bid Contact **Ryan Bouwhuis**
rbouwhuis@weber.edu

Contract Duration **5 years**
Contract Renewal **5 annual renewals**
Prices Good for **60 days**

Item Response Form

Item **Q42701-01-01 - Cost Proposal**
Quantity **1 each**
Prices are not requested for this item.
Delivery Location **Weber State University**
Weber State University
1013 University Circle
Ogden UT 84408-1013
Qty 1

Description

Provide a cost proposal uploaded separately from the response

CLAIM OF BUSINESS CONFIDENTIALITY

Pursuant to Utah Code Ann., Subsections 63G-2-305(1) and (2), and in accordance with Section 63G-2-309, the undersigned company asserts the claim of business confidentiality to protect the following information submitted as part of a Request for Proposals.

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.

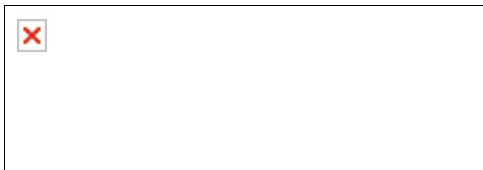
You will be notified if a record claimed to be protected herein under Utah Code Ann. • 63G-2-305 (1) or (2) is classified public or if the governmental entity determines that the record should be released after balancing interests under Utah Code Ann. Subsection 63G-2-201 (5)(b) or Utah Code Ann. Subsection 63G-2-401(6). See Utah Code Ann. Subsection 63G-2-309.

Signature

Company

Title

Date



Invitation to Bid/RFP

Quote No:
Q42701

Due Date & Time:
Jan 31, 2012
2:00:00 PM MST

Send Orders To:

Business Name:

Address:

Address 2:

City:

State : Zip:

Remittance Address:
(If different from above)

City:

State: Zip:

Contact Name:

Phone: Fax

Email Address:

Price Guarantee Period:
(Minimum 60 Days)

FOB:

Payment Terms:

Estimated Delivery ARO

Does your company accept Mastercard credit cards?

☐ Yes

☐ No

Is your company Minority Business Enterprise?

☐ Yes

☐ No

Company's Internet Web Address:

Substitute W-9 Information:

Business, Trade, or DBA (doing business as):

(If different from above)

Check the box which describes the your type of business and provide the corresponding required information:

☐ Individual or Sole Proprietorship	Name of owner as known To Social Security Administration: SSN (Social Security Number) of owner:
☐ Limited Liability Company (LLC) ☐ Partnership ☐ Incorporated Legal Service ☐ Incorporated Med Service Corporation ☐ Incorporated Trust/Estate ☐ Federal Governmental Entity ☐ Local or State Government Entity ☐ Nonprofit Organization ☐ Sub chapter S Corporation	Name of Business as entered on charter or document creating the legal entity: TIN, EIN or FED ID: (Taxpayer Identification Number)

Certification: Under penalties of perjury, I certify that:

(1) The number(s) shown on this form is my correct taxpayer identification number(s) (or I am waiting for a number to be issued to me), **and** (2) The organization entity and all other information provided is accurate, **and** (3) I am not subject to backup withholding either because I have not been notified that I am subject to backup withholding as a result of a failure to report all interest or dividends, or the Internal Revenue Service has notified me that I am no longer subject to backup withholding. You must cross out item (3) above if you have been notified by IRS that you are currently subject to backup withholding because of under reporting interest or dividends on your tax return.

Authorized Signature

Typed Name

Title

Phone Number

Date

Request For Proposal

For Enterprise Email and Messaging Solution

RFP #Q42701

December 28, 2011

Weber State University
Purchasing Department
1013 University Circle
Ogden, Utah 84408-1013

SECTION 1 - PURPOSE OF RFP

- 1.01 Purpose. Weber State University (WSU) seeks an enterprise-class messaging solution to support synchronous and asynchronous electronic communication and availability for faculty and staff.

SECTION 2 - GENERAL INFORMATION

- 2.01 Administrative Guidance. The information provided herein is intended to assist suppliers 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, but is not intended to limit a proposal's content or to exclude any relevant or essential data therefrom. Suppliers are at liberty and are encouraged to expand upon the specifications to evidence service capability under any proposal.
- 2.02 Issuing office and RFP Reference Number. The Purchasing Department of Weber State University is the issuing office for this RFP and all subsequent addenda relating to it. The reference number for the transaction is **Q42701**. This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.
- 2.03 Response Date. In order to be considered for selection, your proposal must be received electronically via Bidsync's website. Submitting your response to Weber State University via Bid Sync is free of charge. Please register at www.bidsync.com , or contact their customer service department at 801-765-9245.

Responses will be accepted **no later than 2:00 p.m. current Mountain Time on Tuesday, January 31, 2012**. Any proposal in route, either in the mail or other locations on the campus will not be considered timely and will be returned unopened. Proposals received after this deadline will be late and ineligible for consideration. 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 2.14 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 electronically via Bid Sync.

Questions and answers will be consolidated and available to all suppliers on record as having received this RFP. All inquiries must be received by **(January 19, 2012)**.

- 2.06 Important Dates. The following dates are significant for this RFP:
- | | |
|---------------------------|-------------------|
| RFP Dated and Issued | December 28, 2011 |
| RFP Inquiry Questions Due | January 19, 2012 |
| Proposal Response Date | January 31, 2012 |

- 2.07 Proposal Validity Time. Proposals containing less than 60 calendar days acceptance time will not be considered.
- 2.08 Consideration 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. However, The University may initiate discussions should clarification or negotiation be necessary. Suppliers shall be prepared to send qualified personnel to discuss technical and contractual aspects of their proposal.
- 2.09 Oral Presentation. An oral presentation by a supplier to supplement a proposal may be required. These presentations will be scheduled, if required, by the Purchasing Department subsequent to the receipt of proposals and prior to the award of the contract.
- 2.10 Gratuities. By written notice to the supplier(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 supplier, or any agent or representative of the supplier, 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.
- 2.11 Award of the Contract. The Purchasing Department 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.
- 2.12 Contract Period and Effective Date. The anticipated contract term will be a five (5) year contract with an option to renew for five (5) additional periods of one (1) year at the University's discretion. The anticipated effective date of the contract is February 2012.
- 2.13 News Releases. News releases pertaining to the RFP, any proposal or the contract will be made only by the University.
- 2.14 Protected Information. State Procurement Rule, R-33-3, 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 offeror(s) and after receipt of a GRAMA request. Any person (supplier) 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. 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.
- 2.15 Notices. The supplier must specify the name, title, address, phone and email address of the person to whom all correspondence regarding any contract awarded as a result of this RFP should be directed (including amendments to the contract). All amendments must be in writing and signed by both parties.

- 2.16 Incurring Costs. The University will not be liable for any cost which suppliers may incur in 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, there is no intent within these instructions to limit a proposal's content or to 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 Alternative Proposals. A supplier may submit more than one proposal, each of which must follow the Proposal Response Outline (section 4 hereof) and satisfy the requirements of this RFP. The supplier's prime proposal must be complete and comply with all instructions. The alternative proposals 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 prime proposal. If alternative proposals are submitted, the supplier must explain the reasons for the alternative(s) and its comparative benefits. Each proposal submitted will be evaluated on its own merits.
- 2.19 Authorized Supplier Representatives. The proposal will list the name, title, office address, telephone number, fax number and email address of the person(s) authorized to represent the supplier regarding this RFP. The University reserves the right to (1) interview and select supplier's personnel who will provide services and (2) negotiate a change in the individual assigned to represent the supplier 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.
- 2.20 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 the subcontract. Any supplier proposing subcontracts as a part of a proposal must explicitly state so in the proposal, and must include the above stated information for each subcontract. Written approval by the University Purchasing Department 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 the RFP.
- 2.21 Assignment. The successful supplier shall not assign or subcontract any portion of its obligations under the contract without the prior written consent of the University. Assignment or subcontracting shall in no way relieve the successful supplier of any of its obligations.
- 2.22 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.
- 2.23 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.
- 2.24 Cancellation. Inadequate delivery or failure to adhere to the contract covenants may result in cancellation of the contract. The supplier 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 defaulting 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 default are not taken within this period, the non-defaulting party may cancel the contract at the end of said thirty (30) day period.

- 2.25 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.
- 2.26 State and Local Taxes. The University is exempt from sales and excise taxes. Exemption certification information appears on all purchase orders issued by the University and such taxes will not apply unless otherwise noted.
- 2.27 Anti-Collusion. The submittal of a proposal constitutes agreement that the supplier has not divulged its proposal to suppliers, nor has the supplier colluded with any other suppliers or parties to a proposal what-so-ever.
- 2.28 Indemnification. The supplier shall hold harmless, defend and indemnify Weber State 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 Supplier, or (b) Supplier's use of University premises, or (c) any act, error, or omission on the part of the Supplier, or its agents, employees, 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 Weber State University, its officers, employees or agents.
- 2.29 Insurance. The supplier 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 supplier to effectively service the proposed contract.
- 2.31 Right to Reject. The University reserves the right to reject in whole or in part any or all proposals and to waive any informality or technicality in any proposal in the interest of the University. Subsequent procurement, if any, will be in accordance with Weber State University contractual action. Non-compliance with the conditions of this proposal may result in disqualification of the offending supplier.

- 2.32 Record Keeping and Audit Rights. Any supplier providing goods or services under any Contract shall maintain accurate accounting records for all goods and services provided thereunder, and shall retain all such records for a period of at least three (3) years following termination of the Contract. Upon reasonable notice and during normal business hours the University, or any of its duly authorized representatives, shall have access to and the right to audit any records or other documents pertaining to the Contract. The University's audit rights shall extend throughout the term of the Contract and for a period of at least three (3) years thereafter.
- 2.33 Payment and Performance Evidence. Supplier will provide evidence of financial responsibility, which demonstrates the Supplier's ability to perform the services contemplated by the RFP. Such evidence of financial strength may be in the form a performance bond, letter of credit, financial statements or other form which is reasonably acceptable to the University.
- 2.34 Price Reduction. If at any time after the award of a contract, the successful supplier reduces the price of any article or service covered under the contract resulting from this RFP, the successful supplier shall give the University proportionately reduced pricing for such articles or services.
- 2.35 Solicitation of Employees. The selected supplier and the University agree not to solicit each other's employees for a period of 2 years following completion of contract.
- 2.36 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 by WSU.
- 2.37 Contracts. If you wish your contractual document(s), in whole or in part, to comprise a portion of the final governing language of any agreement arising from this RFP, (including maintenance agreements), a copy of that agreement(s) must be submitted with your response. A legal review of your contractual demands in view of what is acceptable to the University as an entity of the State of Utah shall be part of the criteria in evaluating our offer.
- The University will not enter into any contract or affix signature to any document, the terms of which require the University to waive conditions or requirements negotiated via this solicitation process, provided for in the document or by mutual consent. Any document containing a clause or clauses that purport to supersede all other documents included in, or arising from the RFP process will be rejected.
- 2.38 Endorsement. Unless specifically authorized in writing by the University Purchasing Department on a case by case basis, the Contractor shall have no right to use, and shall not use, the name of Weber State University, its officials or employees, or the seal or mark of the University in advertising, publicity, or promotion; nor to express or imply and endorsement of Contractor's supplies or services.
- 2.39 Availability to Other State Institutions. In the event a contract between the University and the Supplier results from the RFP, the Supplier shall offer the same prices, terms, conditions, and all other particulars herein to all other institutions within the State of

Utah. Provided however, that the Supplier may apply fair and reasonable delivery cost adjustments to those institutions whose location may be materially remote or primate when compared to the delivery distances contemplated under this RFP.

- 2.40 Equal Opportunity. Consistent with University's policies, in connection with any work performed upon acceptance of bid, the Contractor agrees to abide by the letter and spirit of the Civil Rights Act of 1964, 45 CFR 90, and Federal Executive Order No. 11246, as amended by Executive Order No. 11375, as applicable, which are incorporated herein by reference. Contractor also agrees to comply with the American Disabilities Act of 1990 and Sections 503 and 504 of the Rehabilitation Act of 1973. Contractor agrees to comply with the provisions of the Utah Antidiscrimination Act and any Utah Executive Order regarding discrimination. Contractor agrees to incorporate these provisions as necessary with regard to any subcontracts and to provide all required notices to each labor union or workers' representative stating the Contractor's responsibilities under these provisions. Specifically, Contractor agrees not to discriminate against any employee or applicant for employment because of race, color, creed, religion, national origin, sex, sexual preference, marital status, veteran's status, status with regard to public assistance, disability or age. This provision will include, but not be limited to, the following: employment, upgrading, promotion, demotion or transfer, recruitment advertising, lay off or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. Contractor further agrees to take affirmative action to insure equal employment opportunities.
- 2.41 Further Agreements. In addition to a proposal, the University may from time to time require a supplier to execute certain additional documents or agreements, including without limitation a Contract, for the purpose of clarifying the intention of the parties with respect to providing the goods or services hereunder.
- 2.42 Relationship of the Parties. In assuming and performing the obligations of any Contract, the University and any supplier 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.
- 2.43 Compliance with Payment Card Industry Data Security Standard , Data Privacy and Cardholder Information Security Program.
The Supplier agrees to comply with the Payment Card Industry Data Security Standard (PCIDSS), Data Privacy and with Visa's Cardholder Information Security Program (CISP).
- 2.44 Title to Designs and Copy. Title to all concepts, plans, strategies, and other supplies and services produced/purchased as a result of this RFP, will become the property of Weber State University.
- 2.45 Non-appropriation of Funds. Vendor acknowledges that WSU cannot contract for the payment of funds not yet appropriated by the Utah State Legislature. If funding to WSU is reduced due to an order by the Legislature or the Governor, or is required by State law, or if federal funding (when applicable) is not provided, WSU may terminate this contract or proportionately reduce the services and purchase obligations and the amount due from WSU upon thirty (30) days written notice. In the case that funds are not appropriated or are reduced, WSU will reimburse the vendor for products delivered or

services performed through the date of cancellation or reduction, and WSU will not be liable for any future commitments, penalties, or liquidated damages

- 2.46 Status Verification. 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 the supplier's or supplier's agent's, contractor's or 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

- 3.01 Scope. WSU seeks to replace an on-premise GroupWise system, which provides email, calendar scheduling, availability information and instant messaging services for university faculty and staff. The system must be modern, scalable and flexible enough to support the university for the next 7-10 years. It is the intention of the university that the system provides a platform for additional Unified Communications services. WSU is open to proposals for on-premise or cloud based systems.

Student email services are not included in this request.

A successful proposal will include a strategy for migrating existing GroupWise data (messages, contacts, appointments, notes, documents, tasks, resources and security configurations), including personal archive files (native GroupWise archive format), to an appropriate storage/retrieval mechanism in the new system.

Finalists will be required to provide demonstrations and sufficient time for end-user/administration pilot testing prior to award.

- 3.02 Specifications. The specifications are tagged as "P" for primary and "S" for secondary to indicate the level of importance.

A. Functionality. Describe your solution's ability to meet/exceed the following:

1. Email
 - a. (P) Basic email functionality to send and receive messages
 - b. (P) Send CC and BCC copies to other recipients
 - c. (P) Auto-complete To, CC, and BCC fields based on user's name
 - d. (P) Format messages in plain-text or use a GUI for rich text or HTML formatting
 - e. (P) Set default formats for received messages and new messages

- f. (P) Include attachments with messages
- g. (P) Specify respondent system maximum size limitations on attachments
- h. (P) Retract email messages within specified respondent system parameters (Specify parameters)
- i. (P) Automatically include previous messages in a forward
- j. (P) User setting whether headers are included in a reply and forward
- k. (P) User setting whether previous messages are automatically included in a reply
- l. (P) User automatically adding a signature to outgoing messages
- m. (P) Retain email, appointments, tasks and notes in the system mailbox/storage within specified respondent system parameters (Specify parameters)
- n. (P) Mark a message as Read/Unread and configure settings for marking as Read/Unread (Specify parameters)
- o. (P) Message sender setting message priority and security tags
- p. (P) Tag incoming email as spam and filter or block tagged addresses
- q. (P) Capture and save an email as a document (file)
- r. (P) Auto-save draft email messages
- s. (P) No restriction by vendor on file types that may be sent as attachments (Specify parameters)
- t. (P) Attach a file using drag-and-drop
- u. (P) User decision at send-time to add a signature to outgoing messages
- v. (P) Schedule or delay the delivery of a message, appointment or task
- w. (P) Create custom message views, including sorting and grouping for any header field
- x. (P) View messages as discussion threads

- y. (P) User provisioning safe lists (e.g. junk mail handling) and review and accept filtered messages
- z. (S) Listserv capabilities
- aa. (S) Setting up custom polls through email
- bb. (S) User overriding the “include previous message” setting for specific messages
- cc. (S) Message sender adding a “reply requested” tag to a message, appointment, task or note

2. Calendar and Scheduling

- a. (P) Create and send appointments within the respondent system and to other systems using standard fields including, but not limited to From, To, CC, BCC, Location, Title, Message, Start Time, End Time, Free/Busy, All-day Event, etc.
- b. (P) Having both personal and shared calendars
- c. (P) Import and export calendars
- d. (P) Sender to delete, retract or modify appointments (including modifying attendees) within the respondent system and to send modification notifications to other systems
- e. (P) Implement calendar-specific proxy access controls for No Access, Free/Busy, Full Details and Edit
- f. (P) Set appointment notification preferences and have appointment notifications appear within specified respondent system parameters (Specify parameters)
- g. (P) Schedule recurring appointments and the ability for the scheduler to modify individual appointments within a recurring schedule
- h. (P) Schedule rooms and equipment as resources within an appointment
- i. (P) Set user proxy rights for managing rooms and equipment within specified respondent system parameters (Specify parameters) with access controls for No Access, Free/Busy, Full Details and Edit
- j. (P) Schedule appointments using Free/Busy information and do a search to find available times

- k. (P) View multiple user and resource calendars side by side for scheduling
 - l. (P) Appointment recipient to forward or delegate an appointment
 - m. (P) Customizable multi-calendar user view with selected personal, proxy and global calendars
 - n. (P) Sender to configure notification messages (Accepted, Rejected, etc.) for appointment responses
 - o. (P) Appointment sender to view a list of attendee appointment responses
 - p. (P) Appointment invitee to see a list of other invitees
 - q. (P) Appointment sender to set appointment priority and security tags
 - r. (S) Display a map of an appointment's location
 - s. (S) Appointment invitee to see responses of other invitees
 - t. (S) Poll message recipients for preferred meeting times
 - u. (S) Implement appointment-specific proxy access controls for No Access, Free/Busy, Full Details and Edit
3. Contact Management
- a. (P) Create user-defined contact lists and groups and share them with specified users
 - b. (P) Create system/global groups viewable to users and domains
 - c. (P) Limit rights to send to system/global groups or large contact lists within specified respondent system parameters (Specify parameters)
 - d. (P) Address messages and appointments by group (system group or personal group)
 - e. (P) Contact synchronization with integration to Microsoft Active Directory for basic contact management functionality, including but not limited to last name, first name, middle initial, department, title, mobile and other phone numbers, fax number, mailing address, email address, notes, groups, etc.

- f. (S) Contact lookup across multiple WSU domains to enable lookup in the Student domain (mail.weber.edu)
4. Instant Messaging and Tasks
- a. (P) Instant messaging service across WSU domain(s)
 - b. (P) A GUI interface for managing availability (status), contacts and instant message conversations with full functionality with Windows, Mac, and Linux operating systems
 - c. (P) Create secure static chat rooms requiring a password to join
 - d. (P) User to join a chat via an invitation
 - e. (P) Send, assign, and delegate tasks
 - f. (P) View a personal task list by date
 - g. (P) Send files through IM
 - h. (P) Archive content and metadata associated with instant messages
 - i. (S) Set availability and interface with Instant Message services on a variety of standard mobile devices within specified respondent system parameters (Specify parameters)
 - j. (S) Drag-and-drop files into the IM interface
 - k. (S) Add external non-domain contacts to individual user list
 - l. (S) Create custom IM contact folders and re-order contact lists
5. Client, Folders, Filtering, and Search
- a. (P) An integrated GUI client interface for managing messages, appointments, tasks, contacts, IM, notes and preferences with full functionality for Windows, Mac, and Linux operating systems
 - b. (P) A web client for managing messages, appointments, tasks, contacts, IM, notes and preferences
 - c. (P) Synchronize mail, contacts, and calendars with a variety of standard mobile devices
 - d. (P) Read and write messages, appointments, tasks, contacts, notes and preferences on a variety of standard mobile devices within specified respondent system parameters (Specify parameters)

- e. (P) An administrative GUI interface with full functionality for Windows, Mac, and Linux operating systems
- f. (P) User to set up customized folders to store messages, appointments, tasks, contacts and notes
- g. (P) Provide printer-friendly views of all objects, including headers, and send to standard local and network print services
- h. (P) Spell-checking functionality, including automatic spell checking for free-form typing
- i. (P) User to set up a rule allowing automatic archive to local or network storage to accommodate message, appointment, note and task archiving
- j. (P) Delegate specified functionality to another staff member (i.e. proxy assignments, including mail, appointments, reminder notes, tasks, etc.) and set limitations such as All Access, Read-Only, Read-Write, etc.
- k. (P) Describe your policies and procedures for providing tools to allow End Users who have disabilities to use the services
- l. (P) Set up automatic filtering rules on Mail with actions including Reply, Out of Office, Accept, Categorize and Move to Folder
- m. (P) Search all message text within specified respondent system parameters (Specify parameters)
- n. (P) Search attachment headers within specified respondent system parameters (Specify parameters)
- o. (P) User to set up customized categories or color codes to apply to messages, appointments, tasks and notes
- p. (P) Set up filtering/search on Mail, Calendar, Tasks and Notes
- q. (S) User to define a preview window to appear at the right or bottom of the client interface
- r. (S) Search attachment file content (Specify parameters)
- s. (S) Use IM and proxy access on a variety of standard mobile devices

6. Security and eDiscovery
- a. (P) Password policy enforcement by groups or domains. LDAP authentication compatibility required.
 - b. (P) Describe any encryption capabilities provided including the support of transport layer security and at-rest encryption
 - c. (P) Provide and describe spam and virus protection capabilities
 - d. (P) Provide and describe your vulnerability identification and mediation process
 - e. (P) If the proposed solution is cloud based, describe the capabilities for all WSU data to remain within the continental United States
 - f. (P) If the proposed solution is cloud based, describe the capabilities for physical security controls for each Respondent data center and for equipment within the associated data centers
 - g. (P) If the proposed solution is cloud based, describe the capabilities for logical security controls for each Respondent data center and for equipment within the associated data centers
 - h. (P) If the proposed solution is cloud based, what is your standard operating procedure for new hire and termination of your employees with regard to physical and logical security
 - i. (P) If the proposed solution is cloud based, indicate the methodology and frequency in which you audit your physical and logical security
 - j. (P) If the proposed solution is cloud based, describe the capabilities for accessibility and security of email records during their entire storage period with the hosted environment
 - k. (P) If the proposed solution is cloud based, provide your standard operating procedure for allowing authorized customer representatives and/or agents physical access or remote access to the data center facility
 - l. (P) If the proposed solution is cloud based, provide your standard operating procedure for authorizing external government, legal or law enforcement officials physical access or remote access to the data center facility
 - m. (P) If the proposed solution is cloud based, describe your

practices for indexing or scanning data for any use other than providing messaging services to your customers, including generating aggregated demographic or marketing data

- n. (P) Search based on subject, content, sender and/or recipient, date range, metadata or attachment header
- o. (P) Place litigation holds on a specified email address
- p. (P) Verify authenticity, reliability, and integrity of email messages
- q. (P) Capture and preserve/store email message threads, including tracking email by sender and receiver, date, and record series
- r. (P) Multiple mailbox search capability
- s. (P) Provide role-based access controls to other users for litigation purposes
- t. (P) Automated rule capability for archiving specified users per state policy, the Government Records Access and Management Act (GRAMA) and Public Records Management Act requirements
- u. (P) Store search results with any metadata
- v. (P) Add and delete from search results to create an eDiscovery set
- w. (S) Provide and describe any logging processes including the types of services and devices logged; the event types logged; and the information fields
- x. (S) If the proposed solution is cloud based in a multi-tenant server model, explain any security risks associated with the model and provide potential mitigation strategies
- y. (S) Support for two-tier authentication (Specify parameters)

7. Administration, Platform and Performance

- a. (P) WSU to fully manage all accounts including, but not limited to addition, deletion, manipulation, suspension and termination and synchronize email identities with identities that are managed in WSU's authentication directory (Specify parameters)
- b. (P) Administrative access to all system data

- c. (P) Provide your standard operating procedures for the creation and administration of user accounts
- d. (P) Use existing WSU domain names and additional domain names WSU registers in the future
- e. (P) Detect and reject SPAM email at the domain level
- f. (P) Provide anti-virus protection, including spyware/malware protection
- g. (P) Administrator to set size allowances on message, attachment, and mailbox size
- h. (P) Administrator to limit file types that may be sent or received as attachments
- i. (P) Set up administrative accounts that are not visible to other domain users
- j. (P) Administrator to set default date/time and language support preferences
- k. (P) Set default settings for auto-archive, auto-delete, etc.
- l. (P) View and print historical usage, current usage, and statistical reports (Specify parameters)
- m. (P) Describe support for POP and IMAP options for alternative desktop, web and mobile clients for mail, calendar, contacts, notes, tasks, etc.
- n. (P) Users and administrators to access system from any Internet connection
- o. (P) All services must be delivered via secure means (e.g. HTTPS, SSH, TLS, etc.)
- p. (P) Describe any known inherent disaster recovery risks and provide potential mitigation strategies
- q. (P) Explain the steps needed, and costs associated, with enabling converged communication capabilities (for example, integrating presence into email or routing voice mail to email)
- r. (P) Explain the steps needed, and costs associated, with enabling synchronous communication (for example, integrating voice and web conferencing)

- s. (P) Availability of synchronous document creation and collaboration (Explain steps needed and associated costs)
- t. (P) Explain the steps needed, and costs associated, with enabling aggregated presence and location services
- u. (P) Provide the process, responsibilities and costs for the cessation of the contract, including any costs and procedures for data migration
- v. (P) If the proposed solution is cloud based, provide the uptime service and related Service Level Agreement (SLA) criteria
- w. (P) If the proposed solution is cloud based, provide the process to be used for WSU to call the Respondent for support, who will be providing the support, and describe the basis of availability
- x. (P) If the proposed solution is cloud based, describe the consequences if the Respondent fails to meet incident response time and incident fix time
- y. (P) If the proposed solution is cloud based, describe the procedures and schedules for any planned downtime
- z. (P) If the proposed solution is cloud based, describe the consequences if disaster recovery metrics are not met
- aa. (P) If the proposed solution is cloud based, describe any SLAs addressing key application functions such as time for user login
- bb. (P) If the proposed solution is cloud based, describe the deleted item recovery capabilities and specify the time period for deleted item recovery
- cc. (P) Functionality for message or full mailbox recovery
- dd. (P) Provide role-based access control to administer the email system
- ee. (P) Track the message in the system
- ff. (P) Real-time monitoring and reporting for servers/services
- gg. (P) If the proposed solution is cloud based, clarify the system's ability to provide alerts/notifications if the service is compromised or unavailable
- hh. (P) If the proposed solution is cloud based, clarify the respondent

company's ability to provide bandwidth guarantee

- ii. (P) If the proposed solution is cloud based, specify any limitations on number of messages that can be sent or received per mailbox or per system
- jj. (P) If the proposed solution is cloud based, clarify the default recovery point and recovery time objectives
- kk. (P) If the proposed solution is cloud based, describe the responsibility for, and time required for, adding/deleting/moving user mailboxes
- ll. (P) If the proposed solution is cloud based, describe any provider human resources that will be dedicated to the WSU account, the duties of the individual(s) and provisions for regular communications
- mm. (P) If the proposed solution is cloud based, clarify the responsibility for providing end-user help desk services
- nn. (P) Describe the interface customization options for configuring an interface with a WSU look-and-feel
- oo. (P) If the proposed solution is cloud based, describe how requests for increases or decreases in the number of mailboxes or other resources are managed and costs associated with these requests
- pp. (P) If the proposed solution is cloud based, provide the process, responsibilities and costs for cleansing of WSU data from the respondent data centers in the event of contract cessation
- qq. (P) If the proposed solution is cloud based, describe any Sandbox or backup environments you provide, and associated costs
- rr. (P) If the proposed solution is cloud based, describe the processes and procedures for notifying customers of upgrades, patches, and revisions and the time allowance for testing and approval
- ss. (P) If the proposed solution is cloud based, describe the upgrade approval process and the abilities of WSU for rejecting or denying an upgrade if it is not deemed acceptable, secure, etc.
- tt. (P) If the proposed solution is cloud based, describe the policies for showing advertisements through the system to users or administrators
- uu. (P) If the proposed solution is cloud based, describe the

processes and procedures for notifying WSU in the case of a security breach, including notification time, remediation strategy, financial responsibility, etc.

- vv. (P) Describe the frequency of patch and revision releases and the processes for customer notification
- ww. (P) If the proposed solution is on-premise, describe the availability of on-site consulting or support services, from respondent or partners, and associated costs
- xx. (P) If the proposed solution is on-premise, provide full and complete system requirements (hardware and software)
- yy. (P) Provide full and complete end-user minimum and recommended hardware and software requirements (including supported browsers)
- zz. (P) If the proposed solution is on-premise, describe options for migration to a cloud solution (respondent or partner) in the future and any required license changes or costs
- aaa. (S) Self-provision safe lists and review and accept filtered messages
- bbb. (S) Use of "white list," "blacklist" and aliases
- ccc. (S) Selectively produce RSS feeds of emails
- ddd. (S) Describe any additional administrative features
- eee. (S) Prioritize email accounts
- fff. (S) Manage Mobile Devices including security and provisioning for employee owned mobile devices

8. Archive, Backup and Disaster Recovery

- a. (P) Restore archived email data to "live" status (Specify parameters)
- b. (P) Retrieve or discover archived data based on content, sender, recipient, and/or other metadata and attachments
- c. (P) Thoroughly, completely, and securely destroy obsolete records upon completion of legal retention period
- d. (P) Store and retrieve all email data for WSU's specified time

period before data is automatically processed for long term archiving

- e. (P) Archive data based on content, sender, recipient, dates, and other metadata and attachments
- f. (P) Automatic user notifications prior to a user's mailbox becoming full
- g. (P) Describe the system's ability to recover and restore data for all users in the event of a severe outage or disaster
- h. (P) Describe the system's ability to make multiple redundant backups of email messages and other data
- i. (S) Administrator to view and perform all normal email functions on archived data without having to restore
- j. (S) Automated rule capability for archiving specified users per WSU policy, the Government Records Access and Management Act (GRAMA) and Public Records Management Act requirements

9. Conversion Services

- a. (P) Conversion strategy for migrating existing GroupWise data (messages, contacts, appointments, notes, documents, tasks, resources and security configurations), including personal archive files (native GroupWise archive format), to an appropriate storage/retrieval mechanism in the new system (Specify parameters)
- b. (P) Migrated data to retain header information including sender, recipient, date/time, cc, bcc, attachments, etc.
- c. (P) Export all data out of the proposed system, including messages, resources, appointments, tasks, documents, notes, security configuration and archive files

10. Training and Support

- a. (P) Availability of online training documentation, and other contextual help resources for end users
- b. (P) Deployment support from Respondent or Respondent partners (Specify SLA)
- c. (P) Post deployment support from Respondent or Respondent partners (Specify SLA)
- d. (S) Defined processes and curriculum for training the trainer

- e. (S) Availability of in-person training from the Respondent or Respondent partner
- B. 3.03 Detailed Discussion.
 - A. Functionality. Describe how your solution meets/exceeds the Specifications in this RFP.
 - B. Cost. Provide a detailed cost proposal. The cost proposal is to be submitted as an attachment separately from the response. The following items shall be included in the proposal: 3.02 A 7q-u, oo-qq, ww, and zz.
 - C. References. Provide a minimum of three (3) references, complete with the organization name, contact person, and telephone number for whom you have provided services similar in scope of work outlined 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 supplier or 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 supplier's approach and clearly indicate any options or alternatives being proposed. It should also indicate any major requirements that cannot be met by the supplier.
 - 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 supplier to provide the requested product, service or function.
 - D. COST PROPOSAL. The supplier must submit a cost proposal allowing costs to be evaluated independently of other criteria in the proposal. Cost shall only be included in the proposal and are not to be shown anywhere else within the response.

- E. FINANCIAL REPORTS. The supplier should furnish a current audited financial report for the company's most recent fiscal year.
- F. MISCELLANEOUS. Additional information and attachments, if any may be submitted by the supplier.

SECTION 5 - PROPOSAL EVALUATION

- 5.01 Proposal Evaluation Criteria. The criteria to be used by the Selection Committee to evaluate proposals are as follows:

- A. Functionality (65 pts)
 - 1. Email (9 pts)
 - 2. Calendar and Scheduling (8 pts)
 - 3. Contact Management (6 pts)
 - 4. Instant Messaging and Tasks (3 pts)
 - 5. Client, Folders, Filtering, and Search (6 pts)
 - 6. Security and eDiscovery (6 pts)
 - 7. Administration, Platform and Performance (6 pts)
 - 8. Archive, Backup and Disaster Recovery (6 pts)
 - 9. Conversion Services (9 pts)
 - 10. Training and Support (6 pts)
- B. Cost (30 pts)
- C. References (5 pts)

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

In the initial phase of the proposal evaluation process, the evaluation committee will review all proposals timely received. First, non-responsive proposals (those not conforming to RFP requirements) will be eliminated. Second, the remaining proposals will be evaluated in a cursory manner to eliminate from further consideration those proposals which in the judgment of the evaluation committee fail to offer sufficient and substantive provisions to warrant further consideration. Each supplier bears sole responsibility for the items included or not included in the response submitted by that supplier. The University reserves the right to disqualify any proposal that includes significant deviations or exceptions to the terms, conditions and/or specifications in this RFP.

At the conclusion of this initial evaluation phase, finalist supplier proposals will be selected for detailed review and evaluation, including oral presentations if required. The University reserves the right to be the sole judge as to the overall acceptability of any proposal or to judge the individual merits of specific provisions within competing offers.

Question and Answers for Bid #Q42701 - Enterprise Email and Messaging Solution

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.

Question Deadline: Jan 19, 2012 2:00:00 PM MST