
**UNIVERSITY OF LOUISVILLE
PURCHASING DEPARTMENT – BELKNAP CAMPUS
LOUISVILLE, KY 40292**

**PERSONAL SERVICE CONTRACT
REQUEST FOR PROPOSAL
COVER/SIGNATURE PAGE**

REQUEST DATE: 1. February 10, 2011	2. NAME OF DEPARTMENT: IT Next Gen Services CONTACT PERSON: Sherry Roark (slroar01@louisville.edu)	
<u>3. Service</u> On behalf of the University of Louisville, IT Next Gen Services is looking for an in-depth analysis of the new web environment “Plone 4” system. This analysis should include an executive summary, technical findings report, and Q&A session with technical staff needed for a remediation plan.		
4. Due Date March 19, 2012	5. Time Due 4:00 PM	6. Telephone: (502) 852-0947 Fax: (502) 852-7042

Proposals should be sent to the department by the following method:

7. MAIL OR FAX PROPOSALS TO:

University of Louisville
Miller IT Center
ATTN: Sherry Roark, Assistant Director
Room 109
Louisville, Kentucky 40292
Fax #: 502-852-7042

The bottom portion of this form is to be completed by the vendor.

Equal Employment Opportunity – All parties must be in compliance with executive order 11246 of September 24, 1965 as amended by executive order 11375 of October 13, 1967.

STATEMENT OF NON-COLLUSION AND NON-CONFLICT OF INTEREST

I hereby swear (or affirm) under penalty for false swearing as provided by KRS 523.040:

1. That attached Request For Proposal has been submitted without collusion with , and without any agreement, understanding or planned common course of action with, any other vendor of materials, supplies, equipment or services described in the Request For Quotation designed to limit independent competition.

2. That the proposer is legally entitled to enter into the contract with the University of Louisville, an agency of the Commonwealth of Kentucky, and is not in violation of any prohibited conflict of interest, including those prohibited by the provisions of KRS 45A.325, to 45A.340, 34A.990 and 164.990 and 164.821 (7).
3. That I have fully informed myself regarding the accuracy of the statements made above.

In submitting this quotation, it is expressly agreed that upon proper acceptance by the University of Louisville, of any or all items bid, a contract shall thereby be created with respect to the services accepted.

SIGNED

BY: _____ TELEPHONE: _____ FAX: _____

PRINT NAME: _____

FIRM: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

REQUEST FOR PROPOSAL COMPONENTS

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1.0 Introduction

The University of Louisville is seeking proposals from qualified firms to assist with their Plone 4 implementation. A new installation of the Plone environment was approved as part of the University's Strategic Initiatives funded initiatives for FY2012. This was to correct issues with performance and to provide additional functionality for managing web content. The new installation will support moving to Plone 4 and virtualizing the current environment supporting our data center strategy. The qualified vendor will provide an assessment of the production system once the University technical staff provides the setup and installation of the Plone 4 environment. This Request for Proposal (RFP) describes the project, the required scope of services, the contractor selection process, and the minimum information that must be included in the proposal. Failure to submit information in accordance with this RFP's requirements and procedures may be cause for disqualification.

1.1 Due Date

Sealed proposals for furnishing the following **must be received by the University of Louisville by or prior to 4:00 PM EST on Friday, March 19, 2012**. Receipt of proposals by University of Louisville mail system or delivery to areas other than the IT Next Gen Services Department, Attn: Sherry Roark in MITC 109 does not meet this requirement.

2.0 University of Louisville Background

The University of Louisville (UofL) is a state supported, metropolitan research university located in Louisville, Kentucky. It was a municipally supported public institution for many decades prior to joining the state university system in 1970. The University has three campuses. Belknap Campus is three miles from downtown Louisville and houses seven of the university's 11 colleges and schools. The Health Sciences Center is situated in downtown Louisville's medical complex and houses the university's health related programs and the University of Louisville Hospital. Shelby Campus located in eastern Jefferson County supports the National Crime Prevention Institute and the Information Technology Resource Center.

In addition to fostering higher education for the Commonwealth's citizens and those of surrounding communities, the University is also committed to being a premier research institution.

In order to carry out the University's research mission, an affiliated entity, the ULRF was established in 1989 for the purpose of promoting and supporting research projects, investigations, and other activities relating to the educational, scientific, literary, artistic, health care and public service missions of the University.

3.0 Scope of Work

The goal of the project is to evaluate the Plone 4 implementation by way of assessment after the system is setup by University technical staff.

1. **Plone 4 Environment:** UofL's Plone 4 farm contains a cluster of virtual machines powered by the VMWare ESX platform and are installed with Red Hat Enterprise 5.3. There are two dedicated machines running (Squid or Varnish tbd) to provide a reverse caching proxy upstream of the system. There are 2 (this number scales) Zope client machines each running Plone 4.1.x with Zope 2.13.10 and are managed by buildout . There are 2 (this number scales) machines running ZEO services to backend the client machines. The system is connected to the enterprise SAN for BLOB and ZODB storage. The client machines are load balanced by an HAProxy load balancer

and the whole system is front-ended by a NGINX webserver (outside of the virtual machine environment).

Detailed Review of Plone 4 Environment

- a) Database Stabilization
 - Review backend Zope database configuration, installation, and suggest any corrective action needed to increase performance.
 - Inspect for any needed patches and /or recommended fixes that would improve performance.
 - b) Application Server Stabilization
 - Review Plone installation and configuration, validate that these activities were performed to create the best setup possible supporting the web environment.
 - c) Product Review and Stabilization
 - Review out of the box products developed for Plone making sure they are stable and will support University wide use. (additional items could be added to this list)
 - Theming/Styling
 - WYSIWIG Functionality - TinyMC
 - Google Search Appliance
 - Calendaring/Events
 - Blogging
 - Faculty / Staff Directory
 - Forms
 - RSS Feeds
 - Products.Plone Survey
 - Plone Drop Down Menu
 - Bootstrap
 - Inspect new programming features added to Plone environment making the user experience more robust. Recommend any changes or improvements needed to support product stabilization if necessary.
 - Local .CSS fix
 - Flash Integration
 - Image Rotation Custom Button
 - Email Functionality – Button for email gateway
 - Review bootstrap theming structure and make necessary suggestions on creating a better mobile web environment.
 - d) Application Architecture
 - Review Plone structure and function to determine if the design supports continued University web growth.
 - Review the mounting of sites into their own Data.fs for portability and ease of backup/restore
 - Review the mount of catalogs into their own Data.fs for caching improvements and faster access
 - Inspect clustered ZEO service that is redundant.
2. Executive Summary Report: This report includes the overall health and risk results, scorecards, and charts related to the findings of the engagement. This report is intended for senior level management within the University.
3. Technical Findings Report: This report includes the technical details, the vendor's guidance, and vendor's solutions plus action plans for all discovered issues in the environment. U of L's technical team will use this document to understand how to correct issues found during the assessment and the level of importance

4. Q&A Session: The selected vendor must make available technical staff to discuss issues with the current Plone 4 environment documented in the technical findings report. This session will allow University technical staff an opportunity to discuss the proposed vendor actions addressing each issue discovered during the assessment. The assessment should be completed within 4 weeks of the awarded date.

3.1 Informational Background

- 3.1.1 A new installation of the Plone environment was approved as part of the University's Strategic Initiatives funded initiatives for FY2012.
- 3.1.2 The new Plone 4 installation will correct issues with performance and improve functionality for managing web content. University technical staff will perform the installation providing a better customer web infrastructure and support University data center strategy by virtualizing the web environment.

4.0 Proposal Requirements

Written proposals shall include a sample of the contractor's discovery of a technical issue, resolution and implementation methodologies. The proposal should also include identification of project personnel, resumes of key personnel, a proposed project plan, schedule, and provide cost estimates based on number of hours based on hourly rate.

4.1 General

- 4.1.1 The proposal should be concise, well organized, and demonstrate the Contractor's understanding of the Project.
- 4.1.2 Contractors will be evaluated based on the information submitted in accordance with Section 4.2 below.

4.2 Contents

Proposals submitted in response to this RFP shall be in the following order and shall include:

4.2.1 Executive Summary

Include an overview describing your understanding and purpose of this proposal.

4.2.2 Company Background

- Overview of Company
- Position against Competitors
- Strategic Industry Advantages / Partnerships

- 4.2.3 Experience
Describe contractor's experience in completing similar contracting efforts. The contractor should provide a list three (3) references of companies with successfully completed projects for review.
- 4.2.4 Proposed Method to Accomplish the Work
Discuss contractor's approach to the project. Contractor should provide a detailed description and examples of any implementation tasks that are the responsibility of the vendor outlined in 3.0 scope of work area.
- 4.2.5 Project Schedule
Proposers shall provide, as part of its proposal, a proposed project schedule for each of the applicable tasks identified in the scope of work. Separate concurrent schedules for multiple tasks may be proposed. Our Plone 4 environment will launch in July for University wide use and this evaluation must be done with time for any technical fixes needing to be done by University personnel.
- 4.2.6 Project Organization and Key Personnel
Describe proposed project organization, including key personnel and respective responsibilities.
- 4.2.7 Price Proposal and Fee Schedule
- The cost should be broken down into hours needed to prepare the documentation, assessment of environment, Q&A session needed with technical staff, and any travel expenses needed.
 - The total hours and hourly rate meeting the projected amount needed to complete this task.
- 4.2.8 Addenda to this RFP
Contractor shall confirm in its Proposal the receipt of all addenda issued to this RFP. Contractor is not required to include copies of the actual addenda in its Proposal.

5.0 Evaluation Criteria

Proposals shall be evaluated by a selection committee comprised of official of University of Louisville. The proposals will be evaluated on their material content and responsiveness to the requirements of the RFP, the quality of the services offered, the price quoted, the general reputation of the firm, the qualifications of the personnel assigned to work on the project, and the demonstrated understanding of the Respondent of conducting the work as required by the Scope of Services.

1. Executive Summary	5%
2. Company Background	10%
3. Experience	20%
4. Proposed Method to Accomplish the Work	30%
5. Project Schedule	10%
6. Project Organization and Key Personnel	5%
7. Price Proposal and Fee Schedule	20%

6.0 Delivery Options

Any proposal received with the envelope or fax cover sheet not properly and clearly marked with the RFP number and description may result in the proposal being rejected.

6.1 Mail

Proposals must be: **SEALED**; envelope clearly marked with the RFP name, company name, and addressed to:

University of Louisville
Miller IT Center
ATTN: Sherry Roark, Assistant Director
Room 109
Louisville, Kentucky 40292

6.2 Fax

The cover sheet must be clearly marked with the RFP name and description, and the proposal documents faxed to:

(502) 852-7042 - ATTN: Sherry Roark, Assistant Director

The official time of receipt of a faxed proposal is when the last page of the fax is received by University of Louisville as determined by the time stamp placed on the fax by University of Louisville fax machine.

6.3 Email

Proposals sent via email with the RFP name and description in the subject line addressed to: Sherry Roark – slroar01@louisville.edu

RECIPROCAL PREFERENCE

In accordance with KRS 45A.490 to 45A.494, a resident Offeror of the Commonwealth of Kentucky shall be given a preference against a nonresident Offeror. In evaluating proposals, the University will apply a reciprocal preference against an Offeror submitting a proposal from a state that grants residency preference equal to the preference given by the state of the nonresident Offeror. Residency and nonresidency shall be defined in accordance with KRS 45A.494(2) and 45A.494(3), respectively. Any Offeror claiming Kentucky residency status shall submit with its proposal a notarized affidavit affirming that it meets the criteria as set forth in the above referenced statute.

Forms can be found at <http://louisville.edu/purchasing/forms>.