



REQUEST FOR OFFER (RFO)

Server Consolidation Project (10-409.00-006)

Date: February 4, 2011

You are invited to respond to this California Multiple Award Schedule (CMAS) Request for Offer (RFO), entitled *Data Center Consolidation Project* for the Information Technology Services Branch (ITSB) within the California Energy Commission. The services required are described in the Statement of Work (SOW). Please read this document carefully. Selection will be based on best value using the criteria stated in the RFO.

The RFO response including resumes of each proposed candidates and a **complete copy of the CMAS contract including associated price list** is due **Wednesday, February 9, 2011, at 12 noon**. You may submit your offer electronically as long as it is smaller than 5 MB by the due date to Lhoffman@energy.state.ca.us. **If your response is mailed (including US Postal Service or overnight services) or hand delivered, one (1) original and (2) copies of the offer as well as one (1) copy of the complete CMAS contract** must be received by 12:00 noon on due **February 9, 2011**.

Linda Hoffman
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Questions regarding this Request for CMAS Offer are to be directed to Linda Hoffman.



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I. OVERVIEW

A. *Background/Summary*

The Energy Commission is the state's primary energy policy and planning agency. An overview of the Energy Commission can be viewed at the Energy Commission's home page – <http://www.energy.ca.gov>. Created by the Legislature in 1974 and located in Sacramento, the Energy Commission has five major responsibilities:

- Forecasting future energy needs and keeping historical energy data.
- Licensing thermal power plants 50 megawatts or larger.
- Promoting energy efficiency through appliance and building standards.
- Developing energy technologies and supporting renewable energy.
- Planning for and directing state response to energy emergency.

The Energy Commission has over five hundred employees including staff, contractors, and students that work under divisions consisting of branches, offices, and program areas. ITSB supports and maintains the information technology (IT) infrastructure and the business needs of its employees to assist them in meeting the Energy Commission's responsibilities.

Often highly specialized technical support is required to integrate computer related technologies into the Energy Commission's IT infrastructure. As new and often complex technologies are purchased, expert professional services are needed to assist with planning, support during installation and provide operational training to staff. To meet these highly specialized needs a full-service Contractor is required.

The Contractor may engage the services of subcontractors, but the subcontractors must be approved by the Contract Manager.

- Pursuant to GC 19130 (b) (3): The services contracted are not available within civil service, cannot be performed satisfactorily by civil service employees, or are of such a highly specialized or technical nature that the necessary expert knowledge, experience, and ability are not available through the civil service system.
- The maximum amount of this contract is \$70,000.
- The work requested under this contract must be completed within two years from the start date of the contract.
- The start date is estimated to be February 28, 2011.



B. Request for Offer (RFO) Schedule

Table 1 provides the Key Dates and Site Implementation Dates concerning activities related to this RFO.

Table 1: Key RFO and Site Implementation Dates

Request for Offer Action	Action Date
Release of RFO	<i>Friday, February 04, 2011</i>
RFO Response Due Date	<i>Wednesday, February 9, 2011, 12 noon</i>
Anticipated Contract Award	<i>February 24, 2011*</i>
Site Implementation	Action Date
Target Start Date	<i>February 28, 2011*</i>
Target End Date	<i>January 31, 2012</i>

The California Energy Commission reserves the right to adjust the RFO Schedule as required.

**Pending internal California Energy Commission approval and Office of the State Chief Information Officer (OCIO) approval.*

C. Response Requirements

This RFO and the responder’s response to this document will be made part of the ordering department’s Purchase Order and procurement contract file.

Responses must contain all requested information and data and conform to the format described in this section. It is the responder’s responsibility to provide all necessary information for the State to evaluate the response, verify requested information and determine the responder’s ability to perform the tasks and activities defined in the State’s Scope of Work, Attachment A and Cost Worksheet, Attachment B provided as required below.

1. Contractors responding to this RFO are required to submit the Request for Offer Response (specified on the cover sheet) by email or mail to: Linda Hoffman, ITSB Procurement Officer

The email attachments must be smaller than 5 MB. Mailed responses can include, but not limited to USPS, overnight services or hand delivery.

2. Contractors are to submit signed copies of the Response, in its entirety, with original signatures as follows:
 1. If response is submitted electronically, submit one (1) complete copy of the response including a complete copy of the CMAS contract with price list and other documentation as appropriate.
 2. If response is mailed (including United States Postal Service or overnight services) or hand delivered, submit one (1) original and two (2) copies of the response as well as one (1) copy of the CMAS contract with price list and one (1) copy other documentation as appropriate.



Each response must be submitted in a package that clearly identifies the Contractor's name, address, and telephone number. The ITSB Procurement Officer may not accept or review Responses received after the designated time of the RFO Response Due Date.

The Energy Commission expects the total cost to complete the identified Statement of Work tasks to be no more than a maximum amount of \$70,000.00

No services may commence until a contract has been finalized and the appropriate Energy Commission approvals have been obtained.

D. Contractor Offer Submittal Tasks and Responsibilities

Contractors are responsible for providing sufficient information within their RFO response to enable the Energy Commission Evaluation Team to verify information contained in the proposal. Responses must also include information that clearly demonstrates they meet the criteria as described in the attached Statement of Work.

E. Contractor and Contractor's Consultant References

Include in your response a minimum of **THREE (3)** recent projects (within the last 10 years) for the Contractor and the Contractor's proposed Consultant – See **Attachment - A** (Contractor/Consultant Reference Form). At least one of the Contractor's project references must reflect work performed by the proposed Consultant and, if the proposed Consultant is a subcontractor to the Contractor's firm, at least one project must reflect work performed by the Contractor's firm. Complete one Contractor/Consultant Reference Form for each project. The Energy Commission may, at its discretion, contact the listed clients to confirm the information provided by the Contractor and determine client satisfaction with the outcome of the project. This information **must** be provided for each reference in order to satisfy this requirement. **If an item does not apply to the specific project, indicate with "N/A."**

The Energy Commission Evaluation Team may review references submitted by the Contractor to determine previous performance and reserves the right to contact any and all references provided. The Energy Commission Evaluation Team reserves the right to reject any responses received on the basis of: poor past performance as reported by references, the work submitted by the Contractor is not substantially similar to the work described herein (attached Statement of Work); or the work is not verifiable through the reasonable efforts of the Energy Commission Evaluation Team.



EVALUATION CRITERIA

Final selection will be based on BEST VALUE defined in the State Contracting Manual (SCM) Volume 3, Chapter 5, Section A, Topic 3.2. BEST VALUE relates to requirements and supplier selection criterion or other factors for a particular transaction that is established to ensure that business needs and goals are effectively met and that the State obtains the most value. Each response will be checked for the presence or absence of required information in conformance with the submission requirements of this RFO. An Energy Commission Evaluation Team (Evaluation Team) of ITSB staff and Energy Commission management and/or program staff will score those responses based on the Evaluation Criteria and Score Values set forth in the table below. The Evaluation Team shall select the Contractor whose proposal offers the best value based on the Contractor Proposal Submittal Tasks and Responsibilities (item E above), Contractor and Contractor’s Consultant References (item G above), and Cost Evaluation.

Category	Summary of Evaluation Criteria and Score Values	Pass/Fail or Percentage
Completeness of Response	<ul style="list-style-type: none"> ▪ Proposal received as required; date/time ▪ Contractor References ▪ Contractor Resumes ▪ CMAS Contract 	Pass/Fail (Responses must “Pass” to be eligible for further evaluation)
Understanding of the Project Requirements	<ul style="list-style-type: none"> ▪ Demonstrates clear understanding of business objectives from Statement of Work 	10%
Experience	<ul style="list-style-type: none"> ▪ Relevant company experience ▪ Relevant key staff experience 	30%
Qualifications	<ul style="list-style-type: none"> ▪ Relevant qualifications of the Contractor 	30%
References	<ul style="list-style-type: none"> ▪ Evaluation of referenced provide 	20%
Cost	<ul style="list-style-type: none"> ▪ Cost comparison of service fees charged 	10%
Total Score		100%

Cost Evaluation

Cost evaluation will be based as follows:

$$\frac{\text{Lowest Total Cost Offer}}{\text{Responder’s Total Cost Offer}} \times \text{Maximum Final Cost Score} = \text{Score}$$

Example Cost Score Calculation

$$\begin{array}{ccc} \text{Offer 1} & \text{Offer 2} & \text{Offer 3} \\ \frac{\$94,000}{\$100,000} \times 10 = 9.49 & \frac{\$94,000}{\$94,000} \times 10 = 10.0 & \frac{\$94,000}{\$98,000} \times 10 = 9.59 \end{array}$$



STATEMENT OF WORK

A. Summary Description of Work to be Performed

The Information Technology Services Branch (ITSB) within the California Energy Commission (Energy Commission) seeks contracting services that will provide sufficient experience capable of undertaking all work assignments identified in this Statement of Work (SOW). The selected contractor will provide the necessary expert knowledge, experience, and ability required to identify, plan, test, implement and monitor all activities required to successfully migrate servers from the Energy Commission's current data center and co-locations to the Resource Agency Data Center (RADC) and the Office of Technology Services' (OTech) Gold Camp Data Center (Gold Camp). This migration is necessary to meet the directives of the Office of the Chief Information Officer (OCIO), OTech, and the California Natural Resources Agency (CNRA).

B. Tasks, Responsibilities, and Deliverables

Summary of Project Tasks:

- Task 1: Project Management, Documentation and Training
- Task 2: Server Virtualization and Migration to the RADC
- Task 3: Re-location of the Energy Commission's Web servers

Task 1: Project Management, Documentation and Training

The selected contractor will provide Project Management expertise to assist the ITSB Project Manager and staff with the identification and planning of all requirements required for this project and its tasks.

The responsibilities of the selected contractor include:

- Assist with the development of a Project Plan and Schedule that includes all tasks of the project including initialization, planning, design, testing, implementation, and monitoring.
- Assist with the development of a communication plan to provide information to all parties involved in the project and to inform management and all affected users about the migration and any IT service outages that will be required.
- Assist with the identification of all documentation required for the project.
- Monitor project status to provide reports to management, team members, and other associated parties.
- Attend weekly project meetings as required.
- Provide mentoring, training and knowledge transfer to ITSB staff during all tasks of the project.
- Conduct lessons learned reviews after the completion of all tasks of the project.



Task 1: Deliverables

- Provide an initial draft proposal to identify approach, resources, tasks, and dates.
- Using agreed upon criterion create a Project Plan and Schedule using Microsoft Project 2003 or Microsoft Project 2007.
- Develop a communications plan to provide information to all parties involved and affected by the project.
- Prepare, maintain, and complete all required project documentation, as identified, and should include project, implementation, migration, and training documentation. Project documentation will be shared and made accessible to all project team members and interested parties.
- Provide weekly status reports to management, team members, and other associated parties as needed.
- Mentor and train ITSB staff during all tasks of the project.
- Provide technical training on-site for up to six staff on VMware administration.
- Document lessons learned and share with management and stakeholders
- Coordinate with OTech and CNRA to ensure continued connectivity as new technologies are deployed.

Task 2: Server Virtualization and Migration to the RADC

The selected contractor will provide IT Infrastructure Architecture expertise to assist ITSB staff with the migration of both virtual and physical servers to the RADC. The RADC migration will consist of approximately 30-40 virtual servers and approximately 30-45 physical servers. Some existing physical servers (approximately 12-18) may be candidates for virtualization before the move and will require a physical to virtual (P2V) conversion. These P2V virtual servers would be added to the Energy Commission's existing virtual environment. The migration of the virtual servers will consist of moving them to either an existing RADC virtualization infrastructure or an Energy Commission virtual environment built in the RADC white space which would require moving the existing host servers and SAN. The migration of the physical servers will consist of moving them to available RADC white space.

The responsibilities of the selected contractor include:

- Provide IT Infrastructure Architecture services to assess, identify and recommend strategies for the migration to the RADC and to measure the performance of the servers after moving to the RADC
- Incorporate Task 2 planning into the Project Plan and Schedule as identified in Task 1.
- Assist Energy Commission staff with the P2V migration of identified servers.
- Assist with the move of all identified virtual servers to the RADC.
- Assist with the move of all identified physical servers to the RADC.



- Assist with the decommissioning of physical servers once the data has been successfully virtualized and migrated.
- Recommend performance monitoring baselines for trend analysis.
- Provide post implementation support to address residual issues.

Task 2: Deliverables

- Successfully perform P2V migration of identified servers.
- Successfully migrate all identified virtual and physical servers into the RADC.
- Decommission physical servers.
- Implement performance monitoring.

Task 3: Re-locate the Energy Commission's Web servers to the RADC and OTech.

The selected contractor will provide IT Infrastructure Architecture expertise to assist ITSB staff with the re-location of the Energy Commission's primary web server environment to the RADC and the secondary (backup) web server environment to OTech's Gold Camp. The web server environments will include servers, firewall, DNS, and failover appliance equipment. The Energy Commission's primary web server is located at the Herakles Data Center (Herakles) in Natomas and the secondary web server is located at the Energy Commission's Data Center. Because these web servers host the Energy Commission's 14 public websites this effort will require minimal downtime to prevent adversely affecting the public's access.

The responsibilities of the selected contractor include:

- Provide IT Infrastructure Architecture services to assess, identify and recommend strategies for moving the web servers and to measure the performance of the web servers after moving to the RADC and Gold Camp.
- Incorporate Task 3 planning into the Project Plan and Schedule as identified in Task 1.
- Assist with the physical re-location of the primary web server environment to RADC white space and the secondary web server environment to Gold Camp white space.
- Assist with the decommissioning of the space at Herakles once the server environment has been successfully re-located to RADC.
- Recommend performance monitoring baselines for analysis of the web server.
- Provide post implementation support to address residual issues.

Task 3: Deliverables

- Successfully re-locate the Energy Commission's primary web server to the RADC and the secondary web server to Gold Camp.
- Decommission the space at Herakles.
- Implement performance monitoring.



C. Other Reporting Requirements

On a weekly or monthly basis (time-frame to be determined by mutual agreement), each contractor staff person shall complete a timesheet.

D. Contractor's Consultant Performance

The Project Manager and the Energy Commission Project Manager will be the sole judge of the acceptability of all work performed/produced by the Contractor's Consultant as a result of this RFO. Should the work performed by the Consultant fail to meet the conditions, requirements or other applicable standards, specifications, or guidelines under this RFO, the following resolution process will be employed except as superseded by other binding processes. Only by approval of the Project Manager and Energy Commission CIO can any of the following timeframes be adjusted or extended:

- a. Project Manager will notify the Contractor in writing within five (5) business days after completion of each task and phase of milestones of any acceptance problems by identifying the specific inadequacies and/or failures in the services performed by the Contractor's Consultant.
- b. The Contractor will, within five (5) business days after initial problem notification, respond to the Project Manager by submitting a detailed explanation describing precisely how the identified services actually adhere to and satisfy all applicable requirements, and/or a proposed corrective action plan to address the specific inadequacies and/or failures in the identified services. Failure by the Contractor to respond to the initial problem notification within the required time limits may result in immediate contract termination. In the event of such termination, the Energy Commission shall pay all amounts due to the Contractor for all work accepted prior to termination.
- c. The Project Manager will, within five (5) business days after receipt of the Contractor detail explanation and/or proposed corrective action plan, notify the Contractor in writing whether it accepts or rejects the explanation and/or plan. If the Project Manager rejects the explanation and/or plan, the Contractor will submit a revised corrective action plan within three (3) business days of notification of rejection. Failure by the Contractor to respond to the Project Manager's notification of rejection by submitting a revised corrective action plan within the required time limits may result in immediate contract termination. In the event of such termination, the Energy Commission shall pay all amounts due to the Contractor for all work accepted prior to termination.
- d. The Project Manager will, within three (3) business days of receipt of the revised corrective action plan, notify the Contractor in writing whether it accepts or rejects the revised corrective action plan proposed by the Contractor. Rejection of the revised corrective action plan will result in immediate contract termination. In the event of such termination, the Energy Commission shall pay all amounts due to the Contractor for all work accepted prior to termination.



E. *Department Responsibilities*

- Provide access to workspace and necessary equipment including but not limited to: facilities, computers, printers, etc.
- Provide access to key Energy Commission staff
- Provide direction, historical documents, information, and electronic media
- Energy Commission Project Manager, (herein referred to as Project Manager), and ITSB management of monitoring job performance
- Project Manager and appropriate ITSB management to approve milestones and deliverables
- Provide feedback in a timely manner (time frame to be agreed upon per Consultant request for feedback)

II. GENERAL REQUIREMENTS

The Contractor will provide a Consultant with sufficient experience to perform the tasks set forth in this Statement of Work. The Contractor may engage the services of Subcontractors, but the Subcontractors must be approved by the Project Manager of this contract. In all cases, the Contractor must establish all necessary contractual relationships with all Subcontractors, and reimburse all Subcontractors for services performed. The Contractor is responsible for the quality of all Subcontractor work, and the Project Manager will approve all work assignments.



III. PAYMENT AND INVOICES

Payment for services performed under this RFO will be made upon satisfactory completion of deliverables rendered. The Contractor shall prepare and invoice for all contract expenses performed by the Consultant for the assigned activities detailed in the Statement of Work. The Contractor will invoice for each deliverable as it is completed and the deliverables are deemed acceptable by the Energy Commission Project Manager. The official invoice is to be submitted to the Energy Commission's Accounting Office.

- a. All invoices must be submitted to:

California Energy Commission
Attn: Accounting Office
1516 Ninth Street, MS-2
Sacramento, CA 95814-5512
(916) 654-4400

- b. All Contractor invoices must identify charges by activity and deliverable and include the Purchase Order number.
- c. Invoices must be submitted on company letterhead stationary with the company name, address of the Contractor, signature, and title of the person submitting the invoice.
- d. Invoices, if applicable, include a description and the deliverable(s) completed
- e. Invoices are to include the total amount owed for the work completed
- f. If the Project Manager does not accept the identified general tasks or deliverables in this RFO and/or by the appropriate ITSB management, payment of invoice will be withheld. The Contractor will be notified and must take timely and appropriate measures to correct or remedy the reason(s) for non-acceptance. The Contractor must demonstrate to the Project Manager that the Consultant has successfully completed the scheduled work for each general task or deliverable before payment will be made.



Attachment A: Contractor/Consultant Reference Form

Please refer to item G: Contractor and Contractor’s Consultant References which requires submission of three (3) recent project references for Contractor and Consultant

CONSULTANT REFERENCE FORM < add Reference #>	
Contractor Company Name:	Contact/Name:
Proposed Technical Project Assessment Consultant Staff Resource Name: (if different than Prime Contractor)	
Name of Project:	Dates Served on Project (from/to):
Client Name:	Company Phone:
	Contact Name:
Address:	Contact Phone :
	Fax :
	E-Mail Address:
Reference is for work performed by the Contractor (check one): Yes <input type="checkbox"/> No <input type="checkbox"/>	
If “No”, the referenced work <u>must</u> reflect work performed by the proposed Contract staff. If the proposed Contract staff provided these services while working for another Company, list the name of that Company, otherwise leave this space blank.	
Project Objectives:	
Contractor or Contract staff’s Involvement on the Project:	
Project Benefits:	



Project Structure and Stakeholders		
Describe the types of stakeholders involved on the project, both internal and external to the organization conducting the project.		
Project Management Structure and Reporting Responsibilities		
Size and Nature of the System		
Number of Users:	Number of Workstations/Terminals:	
Numbers of Classes of Users:	Type of Network (i.e., LAN and/or WAN):	
Number of Geographically disbursed locations:	Network Operating System:	
Server Platform:	Application Languages:	
Name of DBMS:	Size of Database:	
Project Measurements		
Total Estimated Cost:	Total Actual Cost:	
Total Estimated Hours:	Total Actual Hours:	
Estimated Start and Completion Dates:	From:	To:
Actual Start and Completion Dates:	From:	To:
Original estimated hours on project:	Actual hours on project:	
Additional Project Measurement-Related Information	YES	NO
Was the project/contract terminated prior to successful conclusion? If "yes," please explain the reason:		
Did the system development effort's delivery schedule increase by more than 90 days from the original delivery date? If "yes," please explain the reason:		