



**CONSULTING AND TECHNICAL SERVICES (CATS)
TASK ORDER REQUEST FOR PROPOSALS (TORFP)**

**STATE OF MARYLAND MESSAGING CONSOLIDATION
CATS TORFP PROJECT ADPICS PO #F10P8201021**

DEPARTMENT OF BUDGET AND MANAGEMENT

MAY 8, 2008

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KEY INFORMATION SUMMARY SHEET

This Consulting and Technical Services (CATS) Task Order Request for Proposals (TORFP) is issued to obtain the services necessary to satisfy the requirements defined in Section 2 - Scope of Work. All CATS Master Contractors approved to perform work in the functional area under which this TORFP is released are invited to submit a Task Order (TO) Proposal to this TORFP. All Master Contractors must complete and submit a Master Contractor Feedback form via the CATS web site regardless of whether a TO Proposal is submitted or not. The form is accessible via your CATS Master Contractor login screen and clicking on TORFP Feedback Response Form from the menu. In addition to the requirements of this TORFP, the Master Contractors are subject to all terms and conditions contained in the CATS RFP issued by the Maryland Department of Budget and Management (DBM), Office of Information Technology (OIT) and subsequent Master Contract Project Number 050R5800338, including any amendments.

TORFP Title:	State of Maryland Messaging Consolidation
Functional Area:	FA10 IT Mgmt. Consulting Services
TORFP Issue Date:	May 8, 2008
Closing Date and Time:	05/29/ 2008 at 2:00 PM
TORFP Issuing Agency:	Department of Budget & Management
Send Questions and Proposals to:	Procurement Liaison Office (PLO) Email Address: oitplo@dbm.state.md.us
TO Procurement Officer:	Gisela Blades Office Phone: (410) 260-7678 Office Fax: (410) 974-5615
TO Manager:	Bruce Eikenberg Office Phone: (410) 260-7307 FAX: (410) 974-5060
TO Project Number:	F10P8201021
TO Type:	Fixed price
Period of Performance:	3 months
MBE Goal:	30 Percent
Small Business Reserve (SBR):	No
Primary Place of Performance:	TBD
TO Pre-TORFP Conference:	Department of Budget & Management (follow posted signs) May 16, 2008, 10:00 AM See Attachment 6 for directions.

SECTION 1 - ADMINISTRATIVE INFORMATION

1.1 RESPONSIBILITY FOR TORFP AND TO AGREEMENT

The TO Procurement Officer has the primary responsibility for the management of the TORFP process, for the resolution of TO Agreement scope issues, and for authorizing any changes to the TO Agreement.

The TO Manager has the primary responsibility for the management of the work performed under the TO Agreement; administration functions, including issuing written directions; ensuring compliance with the terms and conditions of the CATS Master Contract; and, in conjunction with the selected Master Contractor, achieving on budget/on time/on target (e.g., within scope) completion of the Scope of Work.

1.2 TO AGREEMENT

Based upon an evaluation of TO Proposal responses, a Master Contractor will be selected to conduct the work defined in Section 2 - Scope of Work. A specific TO Agreement, Attachment 3, will then be entered into between the State and the selected Master Contractor, which will bind the selected Master Contractor (TO Contractor) to the contents of its TO Proposal, including the price proposal.

1.3 TO PROPOSAL SUBMISSIONS

The TO Procurement Officer will not accept submissions after the stated date and exact time. The time will be local time as determined by the Department of Budget & Management (DBM) e-mail system time stamp. The TO Proposal is to be submitted via e-mail as two attachments in MS Word format. The "subject" line in the e-mail submission shall state the TORFP #F10P8201021. The first file will be the TO Proposal technical response to this TORFP and titled, "CATS TORFP #F10P8201021 Technical". The second file will be the financial response to this CATS TORFP and titled, "CATS TORFP #F10P8201021Financial". The following proposal documents must be submitted with required signatures as .PDF files with signatures clearly visible:

- Attachment 1 - Price Proposal
- Attachment 2 - MBE Forms D-1 and D-2
- Attachment 4 - Conflict of Interest and Disclosure Affidavit

1.4 N/A

1.5 ORAL PRESENTATIONS

Master Contractors will be required to make oral presentations to State representatives. Significant representations made by a Master Contractor during the oral presentation must be reduced to writing. All such representations will become part of the Master Contractor's TO proposal and are binding, if the TO agreement is awarded. The Procurement Officer will notify the Master Contractors of the time and place of oral presentations.

1.6 MINORITY BUSINESS ENTERPRISE (MBE)

A Master Contractor that responds to this TORFP shall complete, sign, and submit all required MBE documentation (Attachment 2 - Forms D-1 and D-2) at the time it submits its TO Proposal. **Failure of the Master Contractor to complete, sign, and submit all required MBE documentation at the time it submits its TO Proposal will result in the State's rejection of the Master Contractor's TO Proposal.**

1.7 CONFLICT OF INTEREST

The TO Contractor awarded the TO Agreement shall provide IT technical and/or consulting services for State agencies or component programs with those agencies, and must do so impartially and without any conflicts of interest. Each Master Contractor shall complete and include a Conflict of Interest Affidavit in the form included as Attachment 4 in this TORFP with its TO Proposal. If the TO Procurement Officer makes a determination that facts or circumstances exist that give rise to or could in the future give rise to a conflict of interest within the meaning of

COMAR 21.05.08.08A, the TO Procurement Officer may reject a Master Contractor's TO Proposal under COMAR 21.06.02.03B.

Master Contractors should be aware that the State Ethics Law, State Government Article, §15-508, may prohibit participation in future related implementation procurements.

1.8 NON-DISCLOSURE AGREEMENT

Certain system documentation may be available for potential Offerors to review at a reading room at 45 Calvert St. Annapolis, Maryland. Offerors who review such documentation will be required to sign a Non-Disclosure Agreement (Offeror) in the form of Attachment 9. Please contact the TO Procurement Officer of this TORFP to schedule an appointment.

In addition, certain documentation may be required by the TO Contractor awarded the TO Agreement in order to fulfill the requirements of the TO Agreement. The TO Contractor, employees and agents who review such documents will be required to sign, including but not limited to, a Non-Disclosure Agreement (TO Contractor) in the form of Attachment 10.

1.9 LIMITATION OF LIABILITY CEILING

Pursuant to Section 28(C) of the CATS Master Contract, the limitation of liability ceiling is hereby reduced as follows: Contractor's liability per claim under this TORFP shall not exceed the not to exceed amount stated in section 4.1 of the TO Agreement.

SECTION 2 - SCOPE OF WORK

2.1 PURPOSE AND BACKGROUND

2.1.1 PURPOSE

The purpose of messaging consolidation is to improve the efficiency and effectiveness of electronic data communications throughout State agencies. Currently, there are over fifty State agencies. The purpose of this project is to evaluate existing State Agency electronic data messaging requirements and to identify potential solutions to consolidate electronic messaging services and support. This project will also recommend messaging consolidation implementation strategies for the State and assess the benefits and risks associated with the implementation strategies.

The State is embarking on a strategy of:

- Determining common integrated solutions for each of the various aspects of electronic messaging and electronic messaging support. The State has decided to consolidate using Microsoft Exchange for e-mail and RIM Blackberry for mobile messaging;
- Implementing the solution for all Executive Agencies;
- Utilizing a scalable and phased approach to transition agencies from their current agency messaging systems to the Statewide consolidated messaging system.

Based on the electronic messaging needs of State agencies, DBM is issuing this CATS TORFP to obtain consulting services to determine an appropriate technical approach and implementation strategy to consolidate statewide electronic messaging for State agencies. State priorities for message consolidation include, but are not limited to:

- Messaging availability for end users;
- Microsoft Global Address List (GAL) with the names of all employees within State agencies;
- Access to view and share employee schedules;
- Reduced Statewide Information Technology (IT) messaging costs;
- Similar or improved messaging performance/response time for end users;
- Common integrated solutions for each of the various aspects of electronic messaging and electronic messaging support;
- Federal and State laws and regulations concerning electronically stored information as they relate to requirements to preserve and produce messaging documents for legal purposes.
- Ability to develop and implement retention policies and procedures on an agency by agency basis with records designated as permanent being transferred to the Archives.

This project is consistent with the perpetual objectives of the FY2009 State of Maryland Information Technology Master Plan. Specifically, the perpetual objectives are:

Consolidation – The elimination of duplicative systems to achieve economies of scale. Consolidation refers to integrating IT resources, including physical hardware, human capital, software licensing and operating systems. Consolidation can simplify the State's IT environment, enabling streamlined business processes, thereby reducing support requirements and associated costs.

Interoperability –The ability to exchange and share information across disparate systems, enabling system users to collaborate more effectively.

Standards – The use of industry accepted and State developed best practices as the framework for deploying, operating and maintaining IT operations. These include data, security, hardware and software applications, procurement and project and contract management.

2.1.2 REQUESTING AGENCY BACKGROUND

The executive sponsor for this project is the State Chief of Information Technology is responsible for setting the State's strategic direction for IT and telecommunications, establishing a long range target technology architecture, encouraging cross agency collaboration for the mutual benefit of all, and advocating best practices for operations and project management.

2.1.3 PROJECT BACKGROUND

With few exceptions, State agencies select and manage their own electronic messaging solutions. This includes separate hardware, software, maintenance fees, and technical staff to provide support at each of the agencies. The messaging solutions at each of these agencies are comprised of a combination of some or all of the following types of products:

- messaging server
- electronic messaging client
- authentication
- virus protection/spam control
- server operating system
- encryption
- backup and recovery
- storage device
- web browser
- mobile device
- mobile device operating system
- storage area network (SAN)
- personal computer operating system

To add to the complexity, several agencies use different products within each of the product types resulting in a matrix of current solutions. There is some commonality in the messaging server and electronic messaging client product types within the State. The majority of State agencies utilize either Microsoft Exchange or Novell GroupWise and RIM Blackberry Enterprise Server or Motorola Good Mobile Messaging Server for their primary and mobile device messaging servers and clients. The maintenance of these independent messaging environments is inefficient and not conducive to statewide collaboration.

2.2 TECHNICAL REQUIREMENTS

DBM requires a TO Contractor to determine and evaluate State Agency electronic data messaging requirements and to identify potential solutions to consolidate electronic messaging services and support. The TO Contractor will also recommend messaging consolidation implementation strategies for the State and assess the benefits and risks associated with the recommended implementation strategies.

The proposed consolidated technical and functional messaging solutions will include, but not be limited to the following:

- The E-mail system will be Microsoft Exchange;
- Microsoft Active Directory will be used to provide authentication and authorization services for end users;
- RIM Blackberry will be the mobile messaging solution;
- State agency messaging systems will be consolidated in a phased approach and must have minimal impact on end users;
- Participating end users will have access to a Global Address List containing the names of State agency employees;
- Adequate e-mail spam and virus protection for e-mail must be included as agency messaging systems are consolidated;
- A chargeback process must be available to recover the cost of operations based upon agency usage.

- The system must contain an adequate information life-cycle management infrastructure to allow for the development of agency specific retention policies and procedures and must allow for the transfer to the Archives of permanent record material.

2.2.1 PROJECT APPROACH

The State will provide to the TO Contractor a cross sectional overview of the existing independent electronic messaging solutions that are currently in use at State agencies. As discussed in 2.1.3, there is an array of solutions that are successfully implemented and maintained within independent State agencies. The project approach will be as follows:

1. Review data on agency electronic messaging environments that will be provided by the State. The data provided to the TO Contractor will consist of the participating State agency responses to the questions listed in Attachment 11. This information is considered sensitive and must be returned to the State at the conclusion of the TO agreement.
2. Perform a gap analysis to identify other pertinent agency information that the TO Contractor requires to propose messaging consolidation solutions for the State. The TO Contractor will collect the additional data from all participating State agencies.
3. Provide to the state an overview of current best practices for the implementation of distributed enterprise email systems for organizations similar in size and structure to Maryland State government. The best practices document shall include a section on current best practices for the effective information life-cycle management of electronic mail and their attachments.
4. It is the State's intent to consolidate messaging throughout the State's enterprise of over fifty agencies. To identify and document specific messaging requirements from the State user community, the TO Contractor will conduct on-site messaging assessments with technical representatives from seven separate State agencies. The agencies listed below are considered a representative sample of messaging users throughout the State's enterprise. It is important to note that final deliverables shall be focused on an enterprise State solution for all State agencies and not solely on the seven agencies listed below:
 - a. Maryland Department of Transportation in Hanover, Maryland.
 - b. The Maryland Department of Public Safety and Correctional Services in Baltimore, Maryland.
 - c. The Maryland Department of Human Resources in Baltimore, Maryland.
 - d. The Department of Budget & Management in Annapolis, Maryland.
 - e. The Department of Health and Mental Hygiene in Baltimore, Maryland.
 - f. Maryland State Archives in Annapolis, Maryland.
 - g. Department of Juvenile Services in Baltimore, Maryland
5. Based on messaging data provided by the State and the messaging data requirements collected during the on site assessments, the TO Contractor will propose and present at least two detailed and scalable technical solutions to achieve the State's goal of messaging consolidation. A scalable approach is desired so that State agencies can be transitioned in a phased approach. The technical solutions may include internal (State provided) and/or external (independent third party) resources. Of the technical solutions required, one proposed solution will consist of a centralized messaging host solution and one proposed solution focused on a decentralized and interoperable multiple messaging host solution. For the purpose of this TORFP, the centralized solution is considered one main host facility and the decentralized solution is

considered to be comprised of more than one host, but not as many as one host per site or one host per agency.

6. The State will select one of the proposals as the “primary” solution for further study and refinement.

Further refinement will consist of the following:

- a. The development and presentation of recommended implementation strategies.
 - b. The development of a risk management plan that will include an assessment of the implementation strategies presented and which details the advantages, disadvantages as well as the potential risks. The risks defined should be categorized according to their potential severity and the contractor shall provide risk mitigation suggestions.
 - c. Estimated implementation and recurring cost estimates
7. Optional: As mentioned in 2.2.1 Section 5, the TO Contractor will provided at least two detailed and scalable technical solutions to achieve the State’s goal of messaging consolidation. As an optional task, the State may request the TO Contractor to conduct further study a refinement (as discussed in 2.2.1 section 6) on secondary technical solutions recommended by the TO Contractor.

2.2.2 DELIVERABLES

For each written deliverable, draft and final, the TO Contractor shall submit to the TO Manager one hard copy and one electronic copy compatible with Microsoft Office 2003, Microsoft Project 2003 and/or Visio 2003.

Drafts of all final deliverables are required at least one week in advance of when all final deliverables are due. Written deliverables defined as draft documents must demonstrate due diligence in meeting the scope and requirements of the associated final written deliverable. A draft written deliverable may contain limited structural errors such as poor grammar, misspellings or incorrect punctuation, but must:

- Be presented in a format appropriate for the subject matter and depth of discussion.
- Be organized in a manner that presents a logical flow of the deliverable’s content.
- Represent factual information reasonably expected to have been known at the time of submittal.
- Present information that is relevant to the section of the deliverable being discussed.
- Represent a significant level of completeness towards the associated final written deliverable that supports a concise final deliverable acceptance process.

Upon completion of a deliverable, the TO Contractor shall document each deliverable in final form to the TO Manager for acceptance. The TO Contractor shall memorialize such delivery in an Agency Receipt of Deliverable Form (Attachment 7). The TO Manager shall countersign the Agency Receipt of Deliverable Form indicating receipt of the contents described therein.

Upon receipt of a final deliverable, the TO Manager shall commence a review of the deliverable as required to validate the completeness and quality in meeting requirements. Upon completion of validation, the TO Manager shall issue to the TO Contractor notice of acceptance or rejection of the deliverables in an Agency Acceptance of Deliverable Form (Attachment 8). In the event of rejection, the TO Contractor shall correct the identified deficiencies or non-conformities. Subsequent project tasks may not continue until deficiencies with a deliverable are rectified and accepted by the TO Manager or the TO Manager has specifically issued, in writing, a waiver for conditional continuance of project tasks. Once the State’s issues have been addressed and resolutions are accepted by the TO Manager, the TO Contractor will incorporate the resolutions into the deliverable and resubmit the deliverable for acceptance. Accepted deliverables shall be invoiced within 30 days in the applicable invoice format (Reference 2.5 Invoicing).

When presented for acceptance, a written deliverable defined as a final document must satisfy the scope and requirements of this TORFP for that deliverable. Final written deliverables shall not contain structural errors such as poor grammar, misspellings or incorrect punctuation, and must:

- A) Be presented in a format appropriate for the subject matter and depth of discussion.
- B) Be organized in a manner that presents a logical flow of the deliverable's content.
- C) Represent factual information reasonably expected to have been known at the time of submittal.
- D) Present information that is relevant to the Section of the deliverable being discussed.

The State required deliverables are defined below. Within each task, the TO Contractor may suggest other subtasks or deliverables to improve the quality and success of the project.

2.2.2.1 Project Kickoff Meeting

- A. The TO Contractor shall attend and support a kick-off Meeting within two weeks of NTP with the DBM team to understand and communicate timeline(s) and known requirements. The following will be accomplished at the kick-off meeting:
 - 1. State provides messaging information on existing participating State agencies to the TO Contractor. The data will be the agency input to survey questions discussed in Attachment 11.
 - 2. TO Contractor identifies at least ten State work days that are available to conduct on-site agency messaging assessments for the identified seven State agencies.
 - 3. Based on the available days provided by the TO Contractor, the State will schedule the on-site assessments with the agencies listed in 2.2.1 (or replacement agencies as identified by the State.) If convenient for the State and the TO Contractor, multiple assessments can be scheduled on the same day. The State will coordinate scheduling within two working days upon receipt of the TO Contractor's availability.
 - 4. A draft Project Management Plan is provided to the TO Manager by TO Contractor.
 - 5. A draft Communication Plan provided to the TO Manager by TO Contractor to facilitate State monitoring of the progress of the Project Management Plan.
- B. TO Contractor shall provide minutes of the meeting to the TO Manager within one day after the kick-off meeting is held.

2.2.2.2 Gap Analysis

Upon analysis of the data provided in 2.2.2.1.A, the TO Contractor will perform a gap analysis to determine if it is necessary to collect additional agency messaging information in order for the TO Contractor to propose messaging consolidation solutions for the State. If the survey data provided by the State to the TO Contractor is sufficient, no action is required by the TO Contractor. If additional information is required, the TO Contractor will identify the State agency data required and collect the additional information from participating State agencies.

2.2.2.3 Final Project Plan and Communication Plan

The TO Contractor submits the final Project Management Plan and final Communication Plan to the State TO Manager.

2.2.2.4 Assessment of Messaging Requirements of Seven State Agencies

The TO Contractor shall conduct on site assessments of all electronic messaging requirements for seven State agencies (or substitute agencies) as identified in Section 2.2.1. The individual assessments must be approved and endorsed by the agency's CIT.

2.2.2.5 Identification of Statewide Messaging Requirements

The TO Contractor shall determine the Statewide messaging requirements. Statewide messaging requirements must reflect agency requirements. Additionally, TO Contractor shall conduct a study of Federal and State laws and regulations concerning electronically stored information as they relate to requirements to preserve and produce messaging documents for legal purposes. TO Contractor shall summarize the results to identify minimum State legal obligations. Statewide messaging requirements must be endorsed by the State CIT or delegated representative.

2.2.2.6 Best Practices Documentation

The TO Contractor shall provide to the state an overview of current best practices for the implementation of distributed enterprise email systems for organizations similar in size and structure to Maryland State government. The best practices document shall include a section on current best practices for the effective information life-cycle management of electronic mail and their attachments.

2.2.2.7 Proposed Centralized and Decentralized Technical Solutions are Developed and Presented to the State

The TO Contractor shall consider the State's messaging requirements and priorities to develop one **centralized** and one **decentralized** and interoperable technical approach to Statewide messaging consolidation for State agencies. The TO Contractor will formally present their results to State representatives. The presentation will be conducted at a State facility in, or near, Annapolis, MD. Each proposed solution to implement messaging consolidation shall be based on the following State priorities:

- Security of Statewide messaging
- Performance/operability and responsiveness for end users
- Cost effectiveness
- Ease of administrative management to maintain the technical solution (technical and human resources)
- Ability to monitor performance and provide agency usage reports that can be used to implement chargeback processes for State agencies.
- Least disruptive to end users during agency messaging consolidation
- Federal and State laws and regulations concerning electronically stored information as they relate to requirements to preserve and produce messaging documents for legal purposes must be conducted and the results considered in recommended solutions.

Each proposed solution to implement messaging consolidation shall also include the following:

- Advantages and disadvantages of the specific technical solution
- Identification of recommended hardware/software purchases to implement the proposed solution (initial investment)
- Identification of skill set required to maintain the technical solution
- Plan for a Statewide central Active Directory structure for the purpose of implementing a Statewide Global Address List and to allow participants the opportunity to shared calendar information
 - Proposed method of Active Directory implementation
 - Considerations for integration of non-Active Directory Agency Networks
- Overview of approach to consolidate agency e-mail

- Overview of approach for consolidating mobile messaging
- Overview of approach for consolidating message virus/malware protection
- Overview of approach for consolidating spam protection/elimination
- Overview of approach to accommodate public folders
- Overview of approach to accommodate agency specific messaging needs or customized messaging integration requirements.
- Overview of approach to implement common naming conventions to include existing e-mail agency address and new common domain address such as this example:
FirstName.LastName@md.gov
 - Proposed method of common Internet address domain name implementation
- Overview of approach to ensure:
 - System security
 - System availability
 - Redundancy
 - Disaster Recovery
 - End user mailbox size limitations
 - Message retention (legal minimum requirements)
 - Message archiving
 - Backup and Recovery strategies
 - Remote end user accessibility via the Internet
- Anticipated time-frame for agency migration to Statewide messaging consolidation
- Recommended bandwidth between State agencies and host
- Anticipated start-up and recurring costs (not including staff) to support and to implement the technical solution
- Multiyear Return on Investment analysis

The TO Contractor’s proposed technical solutions must also consider the following:

- Limited downtime to transition end user community
- Similar electronic messaging performance and response time for end user community
- Transparency of the consolidation for the end user community

2.2.2.8 Advanced Analysis on Selected Technical Approach

Within five days of the TO Contractor’s presentation of centralized and decentralized technical solutions, the State will identify one of the solutions as a “Selected” technical solution for additional analysis. For the Selected Solution, the TO Contractor will provide the following:

- Risk Management Plan for the proposed Selected Solution in accordance with the State of Maryland System Development Life Cycle. The Risk Management Plan must be approved by the State’s Project Manager. A template for this document is located at:
http://dbm.maryland.gov/dbm_publishing/public_content/dbm_search/technology/policyplanning/sdlc/risk_mgmt_plan.doc
- Recommended implementation strategy,
- Assessment of recommended implementation strategy to include the advantages, disadvantages, high level cost associated with the strategy, and skill sets required to execute the implementation strategy.

2.2.2.9 OPTIONAL: Advanced Analysis on Secondary Technical Solution

Within five days of the TO Contractor’s presentation of centralized and decentralized technical solutions, the State may request that the TO Contractor to perform additional analysis of the secondary technical solution. For the secondary solution, the TO Contractor will provide the following:

- Risk Management Plan for the proposed Selected Solution in accordance with the State of Maryland System Development Life Cycle. The Risk Management Plan must be approved by the State’s Project Manager. A template for this document is located at: http://dbm.maryland.gov/dbm_publishing/public_content/dbm_search/technology/policyplanning/sdlc/risk_mgmt_plan.doc
- Recommended implementation strategy,
- Assessment of recommended implementation strategy to include the advantages, disadvantages, high level cost associated with the strategy, and skill sets required to execute the implementation strategy

2.2.3 DELIVERABLE/ DELIVERY SCHEDULE

Deliverable ID	Deliverable	Expected Completion
2.2.2.1	Project Kickoff Meeting: TO Contractor provides draft Project Management Plan, Draft Communication Plan, notice of availability (ten State workdays) to conduct the seven on site agency assessments, and minutes of Kickoff Meeting.	NTP + 14 Calendar Days
2.2.2.2	Gap Analysis	NTP + *
2.2.2.3	Final Project Plan and Communication Plan	NTP + *
2.2.2.4	Assessment of Messaging Requirements of Seven State Agencies	NTP + *
2.2.2.5	Identification of Statewide Messaging Requirements	NTP + *
2.2.2.6	Best Practices documentation	NTP + *
2.2.2.7	Proposed Centralized and Decentralized Technical Solutions are Developed and Presented to the State	NTP + *
2.2.2.8	Advanced Analysis on Primary Technical Approach	NTP + *
2.2.2.9	Optional Advanced Analysis on Secondary Technical Approach	NTP + *

Note: The asterisk (*) denotes the dates submitted in the schedule for each task and deliverable, illustrated by a Gantt chart. Start and completion dates for each deliverable shall be indicated as required by TORFP Section 3.2.1 item 6. Because deliverable due dates are dependent upon the State’s declaration of a NTP, scheduling of deliverables shall be expressed in terms of NTP + ## Calendar Days.

2.2.4 REQUIRED PROJECT POLICIES, GUIDELINES AND METHODOLOGIES

The TO Contractor(s) shall be required to comply with all applicable laws, regulations, policies, standards and guidelines affecting information technology projects, which may be created or changed periodically. The TO Contractor(s) shall adhere to and remain abreast of current, new, and revised laws, regulations, policies, standards and guidelines affecting project execution. These may include, but are not limited to:

- A) The nine project management knowledge areas in the PMI's PMBOK.
- B) The State's SDLC methodology at: www.dbm.maryland.gov - keyword: SDLC.
- C) The State's IT Security Policy and Standards at: www.dbm.maryland.gov - keyword: Security Policy.
- D) The State's IT Project Oversight at: www.dbm.maryland.gov - keyword: IT Project Oversight.
- E) The State's of Maryland Enterprise Architecture at www.dbm.maryland.gov - keyword: MTAF (Maryland Technical Architecture Framework).

2.3 TO CONTRACTOR EXPERTISE REQUIRED

The TO Contractor (or proposed personnel) must have demonstrated success in designing or implementing messaging consolidation projects involving over 5,000 users in a multi-site and a multi-domain environment. In the case where the TO Contractor was the designer, direct association between the design and the successful implementation must be demonstrated.

The TO Contractor(or proposed personnel) must also have demonstrated success in the migration of non-Active Directory users to Active Directory and the migration of Novell GroupWise messaging to Microsoft Exchange.

2.4 TO CONTRACTOR MINIMUM QUALIFICATIONS

The following minimum qualifications are mandatory. The TO Contractor shall be capable of furnishing all necessary services required to successfully complete all tasks and work requirements and produce high quality deliverables described herein. The TO Contractor shall demonstrate, in its proposal, that it possesses such expertise in-house or has fostered strategic alliances with other firms for providing such services:

1. Proven Microsoft experience and certification in:
 - Infrastructure Design
 - Security
 - Messaging
2. Demonstrated electronic messaging experience (Government or Private sector) involving over 5,000 users in a multi-site and a multi-domain environment
3. Demonstrated experience with Microsoft domain trust relationships
4. Excellent written and oral communication skills

2.5 INVOICING

Payment will only be made upon completion and acceptance of all deliverables as defined in 2.2.2.

Invoice payments to the Master Contractor shall be governed by the terms and conditions defined in the CATS Master Contract. Invoices for payment shall contain the Master Contractor's Federal Tax Identification Number, as well as the information described below, and must be submitted to the TO Manager for payment approval. Payment of invoices will be withheld if a signed Acceptance of Deliverable form – Attachment 8, is not submitted.

The Master Contractor shall submit invoices for payment upon acceptance of separately priced deliverables, on or before the 15th day of the month following receipt of the approved notice(s) of acceptance from the TO Manager. A copy of the notice(s) of acceptance shall accompany all invoices submitted for payment.

2.5.1 INVOICE SUBMISSION PROCEDURE

This procedure consists of the following requirements and steps:

- A) The invoice shall identify the Department of Budget & Management as the TO Requesting Agency, deliverable description, associated TO Agreement number, date of invoice, period of performance covered by the invoice, and a Master Contractor point of contact with telephone number.
- B) The Master Contractor shall send the original of each invoice and supporting documentation (itemized billing reference for employees and any subcontractor and signed Acceptance of Deliverable form – Attachment 8, for each deliverable being invoiced) submitted for payment to the Department of Budget & Management at the following address: Director, Fiscal Services, 45 Calvert St, Annapolis, Md. 21401.
- C) Invoices for final payment shall be clearly marked as “FINAL” and submitted when all work requirements have been completed and no further charges are to be incurred under the TO Agreement. In no event shall any invoice be submitted later than 60 calendar days from the TO Agreement termination date.

2.6 REPORTING

The Master Contractor and the TO Requesting Agency shall conduct weekly progress meetings. A weekly project progress report shall be submitted one day in advance prior to the discussion to the TO Manager and shall contain, at a minimum, the following information:

- TO Requesting Agency name, TO Agreement number, functional area name and number, reporting period and “Progress Report” to be included in the e-mail subject line.
- Work accomplished during the seven day period.
- Deliverable progress, as a percentage of completion.
- Problem areas, including scope creep or deviation from the work plan.
- Planned activities for the next reporting period.
- Gantt chart updated from the original to show actual progress; as applicable, explanations for variances and plan for completion on schedule.
- An accounting report for the current reporting period and a cumulative summary of the totals for both the current and previous reporting periods. The accounting report shall include amounts invoiced-to-date and paid-to-date.

SECTION 3 - TASK ORDER PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS

3.1 REQUIRED RESPONSE

Each Master Contractor receiving this CATS TORFP must respond within the submission time designated in the Key Information Summary Sheet. Each Master Contractor is required to submit one or two possible responses: 1) a proposal and/or 2) a completed Master Contractor Feedback form submitted electronically via the CATS web site explaining why the Master Contractor will not be submitting a proposal. The form is accessible via, your CATS Master Contractor login screen and clicking on TORFP Feedback Response Form from the menu.

3.2 FORMAT

If a Master Contractor elects to submit a TO Proposal, the Master Contractor shall do so in conformance with the requirements of this CATS TORFP. A TO Proposal shall provide the following:

3.2.1 THE TECHNICAL PORTION OF THE TO PROPOSAL SHALL INCLUDE

A) Proposed Services – Work Plan

- 1) Requirements: A detailed discussion of the Master Contractor's understanding of the work and the Master Contractor's capabilities, approach and solution to address the requirements outlined in Section 2.
- 2) Assumptions: A description of any assumptions formed by the Master Contractor in developing the Technical Proposal.
- 3) Risk Assessment: An assessment of any risks inherent in the work requirements and actions to mitigate these risks.
- 4) Proposed Solution: A description of the Master Contractor's proposed solution to accomplish the specified work requirements.
- 5) Proposed Tools: A description of all proposed tools that will be used to facilitate the work.
- 6) Tasks and Deliverables: A description of and the schedule for each task and deliverable, illustrated by a Gantt chart. Start and completion dates for each task and deliverable shall be indicated. The Gantt chart will form the baseline for task order monitoring, and will be updated bi-weekly as part of progress reporting (see Section 2.6.1).
- 7) Work Breakdown Structure: A detailed work breakdown structure and staffing schedule, with labor hours by skill category that will be applied to meet each milestone and deliverable, and to accomplish all specified work requirements.
- 8) Acceptance Criteria: A statement acknowledging the Master Contractor's understanding of the acceptance criteria.

B) Proposed Personnel

- 1) Identify and provide resumes for all proposed personnel by labor category. The resume should highlight the proposed personnel's applicable responsibilities and accomplishments as they relate to the requirements of this TORFP.
- 2) Certification that all proposed personnel meet the minimum required qualifications and possess the required certifications in accordance to Sections 2.3 and 2.4.
- 3) Provide the names and titles of all key management personnel who will be involved with supervising the services rendered under this TO Agreement.
- 4) Complete and provide, at the interview, Attachment 5 – Labor Classification Personnel Resume Summary.

C) MBE Participation

- 1) Submit completed MBE documents Attachment 2 - Forms D-1 and D-2.

D) Subcontractors

- 1) Identify all proposed subcontractors, including MBEs, and their full roles in the performance of this TORFP Scope of Work.

E) Master Contractor and Subcontractor Experience and Capabilities

- 2) Provide three examples of projects that you have completed that were similar in scope to the one defined in this TORFP Scope of Work. Each of the three examples must include a reference, to be provided at the interview, complete with the following:
 - a) Name of organization.
 - b) Name, title, and telephone number of point-of-contact for the reference.
 - c) Type, and duration of contract(s) supporting the reference.
 - d) The services provided, scope of the contract and performance objectives satisfied as they relate to the scope of this TORFP.
 - e) Whether the Master Contractor is still providing these services and, if not, an explanation of why it is no longer providing the services to the client organization.
- 3) State of Maryland Experience: If applicable, the Master Contractor shall submit a list of all contracts it currently holds or has held within the past five years with any government entity of the State of Maryland. For each identified contract, the Master Contractor shall provide:
 - a) The State contracting entity.
 - b) A brief description of the services/goods provided.
 - c) The dollar value of the contract.
 - d) The term of the contract.
 - e) Whether the contract was terminated prior to the specified original contract termination date.
 - f) Whether any available renewal option was not exercised.
 - g) The State employee contact person (name, title, telephone number and e-mail address).

This information will be considered as part of the experience and past performance evaluation criteria in the TORFP.

F) Proposed Facility

- 1) Identify Master Contractor's facilities, including address, from which any work will be performed.

G) State Assistance

- 1) Provide an estimate of expectation concerning participation by State personnel.

H) Confidentiality

- 1) A Master Contractor should give specific attention to the identification of those portions of its proposal that it considers confidential, proprietary commercial information or trade secrets, and provide justification why such materials, upon request, should not be disclosed by the State under the Public Information Act, Title 10, Subtitle 6, of the State Government Article of the Annotated Code of Maryland. Contractors are advised that, upon request for this information from a third party, the TO Procurement Officer will be required to make an independent determination regarding whether the information may be disclosed.

3.2.2 THE FINANCIAL RESPONSE OF THE TO PROPOSAL SHALL INCLUDE

- A) A description of any assumptions on which the Master Contractor's Financial TO Proposal is based (Assumptions may not constitute conditions, contingencies, or exceptions to the price TO proposal.);
- B) Completed Financial TO Proposal – Attachment 1, including:
 - 1) TORFP # .
 - 2) Fixed-price dollar figures rounded to the nearest whole dollar.

SECTION 4 - PROCEDURE FOR AWARDING A TASK ORDER AGREEMENT

4.1 EVALUATION CRITERIA

The TO Contractor will be selected from among all eligible Master Contractors within the appropriate functional area responding to the CATS TORFP. In making the TO Agreement award determination, the TO Requesting Agency will consider all information submitted in accordance with Section 3.

4.2 TECHNICAL CRITERIA

The following are technical criteria for evaluating a TO Proposal in descending order of importance.

- Experience with similar scoped projects involving consolidation of messaging including; consolidation of diverse e-mail systems, consolidation of diverse mobile messaging systems, the creation of a central active directory structure from separate existing domains, application of centralized anti-virus and anti-spam solutions, and applicable experience with Information Technology security for messaging.
- Certifications, experience, and education of the Master Contractor's staff assigned to the project.
- The Master Contractor's understanding of the work to be accomplished

4.3 SELECTION PROCEDURES

- A) TO Proposals deemed technically qualified will have their financial proposal considered. All others will receive e-mail notice from the TO Procurement Officer of not being selected to perform the work.
- B) Qualified TO Proposal financial responses will be reviewed and ranked from lowest to highest price proposed.
- C) The most advantageous TO Proposal offer considering technical and financial submission shall be selected for the work assignment. In making this selection, technical merit has greater weight than price.

4.4 COMMENCEMENT OF WORK UNDER A TO AGREEMENT

Commencement of work in response to a TO Agreement shall be initiated only upon issuance of a fully executed TO Agreement, Non-Disclosure Agreement –TO Contractor, Purchase Order and by a Notice to Proceed authorized by the TO Procurement Officer.

ATTACHMENT 1 – PRICE PROPOSAL

CATS TORFP # F10P8201021

Deliverable ID	Description	Proposed Price
2.2.2.3	Final Project Plan and Communication Plan	\$
2.2.2.4	Assessment of Messaging Requirements of Seven State Agencies	\$
2.2.2.5	Identification of Statewide Messaging Requirements	\$
2.2.2.7	Develop and present to the State Centralized and Decentralized Technical Solutions	\$
2.2.2.8	Advanced Analysis on Selected Technical Approach	\$
2.2.2.9	Optional Advanced Analysis on Secondary Technical Approach	\$
Total Proposed Fixed Price		\$

Authorized Individual Name

Company Name

Title

Company Tax ID #

SUBMIT AS A .PDF FILE WITH THE FINANCIAL RESPONSE

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS
TO CONTRACTOR MINORITY BUSINESS ENTERPRISE REPORTING
REQUIREMENTS

CATS TORFP # F10P8201021

These instructions are meant to accompany the customized reporting forms sent to you by the TO Manager. If, after reading these instructions, you have additional questions or need further clarification, please contact the TO Manager immediately.

1. As the TO Contractor, you have entered into a TO Agreement with the State of Maryland. As such, your company/firm is responsible for successful completion of all deliverables under the contract, including your commitment to making a good faith effort to meet the MBE participation goal(s) established for TORFP. Part of that effort, as outlined in the TORFP, includes submission of monthly reports to the State regarding the previous month's MBE payment activity. Reporting forms D-5 (TO Contractor Paid/Unpaid MBE Invoice Report) and D-6 (Subcontractor Paid/Unpaid MBE Invoice Report) are attached for your use and convenience.
2. The TO Contractor must complete a separate Form D-5 for each MBE subcontractor for each month of the contract and submit one copy to each of the locations indicated at the bottom of the form. The report is due no later than the 15th of the month following the month that is being reported. For example, the report for January's activity is due no later than the 15th of February. With the approval of the TO Manager, the report may be submitted electronically. Note: Reports are required to be submitted each month, regardless of whether there was any MBE payment activity for the reporting month.
3. The TO Contractor is responsible for ensuring that each subcontractor receives a copy (e-copy of and/or hard copy) of Form D-6. The TO Contractor should make sure that the subcontractor receives all the information necessary to complete the form properly, i.e., all of the information located in the upper right corner of the form. It may be wise to customize Form D-6 (upper right corner of the form) for the subcontractor the same as the Form D-5 was customized by the TO Manager for the benefit of the TO Contractor. This will help to minimize any confusion for those who receive and review the reports.
4. It is the responsibility of the TO Contractor to make sure that all subcontractors submit reports no later than the 15th of each month, regardless of whether there was any MBE payment activity for the reporting month. Actual payment data is verified and entered into the State's financial management tracking system from the subcontractor's D-6 report only. Therefore, if the subcontractor(s) do not submit their D-6 payment reports, the TO Contractor cannot and will not be given credit for subcontractor payments, regardless of the TO Contractor's proper submission of Form D-5. The TO Manager will contact the TO Contractor if reports are not received each month from either the prime contractor or any of the identified subcontractors. The TO Contractor must promptly notify the TO Manager if, during the course of the contract, a new MBE subcontractor is utilized. Failure to comply with the MBE contract provisions and reporting requirements may result in sanctions, as provided by COMAR 21.11.03.13.

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS

FORM D – 1

CERTIFIED MBE UTILIZATION AND FAIR SOLICITATION AFFIDAVIT

This document shall be included with the submittal of the Offeror's TO Proposal. If the Offeror fails to submit this form with the TO Proposal, the TO Procurement Officer shall determine that the Offeror's TO Proposal is not reasonably susceptible of being selected for award.

In conjunction with the offer submitted in response to TORFP No. F10P8201021, I affirm the following:

1. I acknowledge the overall certified Minority Business Enterprise (MBE) participation goal of 30 percent. I have made a good faith effort to achieve this goal.

OR

After having made a good faith effort to achieve the MBE participation goal, I conclude that I am unable to achieve it. Instead, I intend to achieve an MBE goal of [redacted] percent and request a waiver of the remainder of the goal. If I am selected as the apparent TO Agreement awardee, I will submit written waiver documentation that complies with COMAR 21.11.03.11 within 10 business days of receiving notification that our firm is the apparent low bidder or the apparent awardee.

2. I have identified the specific commitment of certified Minority Business Enterprises by completing and submitting an MBE Participation Schedule (Attachment 2 - Form D-2) with the proposal.
3. I acknowledge that the MBE subcontractors/suppliers listed in the MBE Participation Schedule will be used to accomplish the percentage of MBE participation that I intend to achieve.
4. I understand that if I am notified that I am the apparent TO Agreement awardee, I must submit the following documentation within 10 working days of receiving notice of the potential award or from the date of conditional award (per COMAR 21.11.03.10), whichever is earlier.
 - (a) Outreach Efforts Compliance Statement (Attachment D-3)
 - (b) Subcontractor Project Participation Statement (Attachment D-4)
 - (c) MBE Waiver Documentation per COMAR 21.11.03.11 (if applicable)
 - (d) Any other documentation required by the TO Procurement Officer to ascertain offeror's responsibility in connection with the certified MBE participation goal.

If I am the apparent TO Agreement awardee, I acknowledge that if I fail to return each completed document within the required time, the TO Procurement Officer may determine that I am not responsible and therefore not eligible for TO Agreement award. If the TO Agreement has already been awarded, the award is voidable.

5. In the solicitation of subcontract quotations or offers, MBE subcontractors were provided not less than the same information and amount of time to respond as were non-MBE subcontractors.

I solemnly affirm under the penalties of perjury that the contents of this paper are true to the best of my knowledge, information, and belief.

Offeror Name

Signature of Affiant

Address

Printed Name, Title

Date

SUBMIT AS A .PDF FILE WITH TO RESPONSE

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS

FORM D – 2

MINORITY BUSINESS ENTERPRISE PARTICIPATION SCHEDULE

This document shall be included with the submittal of the TO Proposal. If the Offeror fails to submit this form with the TO Proposal, the TO Procurement Officer shall determine that the TO Proposal is not reasonably susceptible of being selected for award.

TO Prime Contractor (Firm Name, Address, Phone)	Task Order Description
Task Order Agreement Number F10P8201021	
List Information For Each Certified MBE Subcontractor On This Project	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	

USE ATTACHMENT D-2 CONTINUATION PAGE AS NEEDED

SUMMARY

TOTAL MBE PARTICIPATION:	_____ %
TOTAL WOMAN-OWNED MBE PARTICIPATION:	_____ %
TOTAL AFRICAN AMERICAN-OWNED MBE PARTICIPATION:	_____ %

Document Prepared By: (please print or type)

Name: _____ Title: _____

SUBMIT AS A .PDF FILE WITH TO RESPONSE

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS

FORM D – 2

MINORITY BUSINESS ENTERPRISE PARTICIPATION SCHEDULE (CONTINUED)

List Information For Each Certified MBE Subcontractor On This Project	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	
Minority Firm Name	MBE Certification Number
Work To Be Performed/SIC	
Percentage of Total Contract	

SUBMIT AS A .PDF FILE WITH TO RESPONSE

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS

FORM D – 3

OUTREACH EFFORTS COMPLIANCE STATEMENT

In conjunction with the bid or offer submitted in response to TORFP #F10P8201021, I state the following:

1. Offeror identified opportunities to subcontract in these specific work categories:

2. Attached to this form are copies of written solicitations (with bidding instructions) used to solicit certified MBEs for these subcontract opportunities.

3. Offeror made the following attempts to contact personally the solicited MBEs:

4. Offeror assisted MBEs to fulfill or to seek waiver of bonding requirements.

(DESCRIBE EFFORTS)

 This project does not involve bonding requirements.

5. Offeror did/did not attend the pre-proposal conference
 No pre-proposal conference was held.

Offeror Name

By: _____
Name

Address

Title

Date

SUBMIT WITHIN 10 WORKING DAYS OF RECEIVING NOTICE OF THE POTENTIAL AWARD

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS

FORM D – 4

SUBCONTRACTOR PROJECT PARTICIPATION STATEMENT

SUBMIT ONE FORM FOR EACH CERTIFIED MBE LISTED IN THE MBE PARTICIPATION SCHEDULE

Provided that _____ is awarded the TO Agreement in
(Prime TO Contractor Name)

conjunction with TORFP No. F10P8201021, it and _____,
(Subcontractor Name)

MDOT Certification No. _____, intend to enter into a contract by which the subcontractor shall:

(Describe work to be performed by MBE):

- No bonds are required of Subcontractor
- The following amount and type of bonds are required of Subcontractor:

By:

By:

Prime Contractor Signature

Subcontractor Signature

Name

Name

Title

Title

Date

Date

SUBMIT WITHIN 10 WORKING DAYS OF RECEIVING NOTICE OF THE POTENTIAL AWARD

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS

FORM D – 5

MINORITY BUSINESS ENTERPRISE PARTICIPATION TO CONTRACTOR PAID/UNPAID INVOICE REPORT

Report #: _____ Reporting Period (Month/Year): _____ Report is due by the 15th of the following month.	CATS TORFP #F10P8201021 Contracting Unit _____ Contract Amount _____ MBE Sub Contract Amt _____ Contract Begin Date _____ Contract End Date _____ Services Provided _____
--	---

Prime TO Contractor:		Contact Person:	
Address:			
City:		State:	ZIP:
Phone:	FAX:		
Subcontractor Name:		Contact Person:	
Phone:	FAX:		
Subcontractor Services Provided:			
List all unpaid invoices over 30 days old received from the MBE subcontractor named above:			
1.			
2.			
3.			
Total Dollars Unpaid: \$ _____			

**If more than one MBE subcontractor is used for this contract, please use separate forms.

Return one copy of this form to the following address:

Bruce Eikenberg DBM 45 Calvert Street Annapolis, MD 21401	Edward Bannat DBM 45 Calvert Street Annapolis, MD 21401 ebannat@dbm.state.md.us
--	---

Signature: _____ Date: _____

SUBMIT AS REQUIRED IN TO CONTRACTOR MBE REPORTING REQUIREMENTS

ATTACHMENT 2 – MINORITY BUSINESS ENTERPRISE FORMS

FORM D – 6

MINORITY BUSINESS ENTERPRISE PARTICIPATION SUBCONTRACTOR PAID/UNPAID INVOICE REPORT

Report #: _____ Reporting Period (Month/Year): __/_____ Report Due By the 15th of the following Month.	CATS TORFP #F10P8201021 Contracting Unit _____ Contract Amount _____ MBE Sub Contract Amt _____ Contract Begin Date _____ Contract End Date _____ Services Provided _____	
MBE Subcontractor Name: _____		
MDOT Certification #: _____		
Contact Person: _____		
Address: _____		
City: _____	State: _____	ZIP: _____
Phone: _____	FAX: _____	
Subcontractor Services Provided: _____		
List all payments received from Prime TO Contractor during reporting period indicated above. 1. 2. 3. Total Dollars Paid: \$ _____	List dates and amounts of any unpaid invoices over 30 days old. 1. 2. 3. Total Dollars Unpaid: \$ _____	
Prime TO Contractor: _____		Contact Person: _____

Return one copy of this form to the following address:

Bruce Eikenberg DBM 45 Calvert Street Annapolis, MD 21401	Edward Bannat DBM 45 Calvert Street Annapolis, MD 21401 ebannat@dbm.state.md.us
--	---

Signature: _____ Date: _____

SUBMIT AS REQUIRED IN TO CONTRACTOR MBE REPORTING REQUIREMENTS

ATTACHMENT 3 – TASK ORDER AGREEMENT

CATS TORFP #F10P8201021 OF MASTER CONTRACT #050R5800338

This Task Order Agreement (“TO Agreement”) is made this day of Month, 200X by and between Task Order Contractor (TO Contractor) and the STATE OF MARYLAND, Department of Budget and Management, Office of Information Technology (DBM/OIT).

IN CONSIDERATION of the mutual premises and the covenants herein contained and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

1. Definitions. In this TO Agreement, the following words have the meanings indicated:
 - a. “Agency” means the DBM/OIT, as identified in the CATS TORFP # F10P8201021.
 - b. “CATS TORFP” means the Task Order Request for Proposals # F10P8201021, dated May 8, 2008, including any addenda.
 - c. “Master Contract” means the CATS Master Contract between the Maryland Department of Budget and Management and TO Contractor dated December 19, 2005.
 - d. “TO Procurement Officer” means Gisela Blades. The Agency may change the TO Procurement Officer at any time by written notice to the TO Contractor.
 - e. “TO Agreement” means this signed TO Agreement between DBM/OIT and TO Contractor.
 - f. “TO Contractor” means the CATS Master Contractor awarded this TO Agreement, whose principal business address is _____ and whose principal office in Maryland is _____.
 - g. “TO Manager” means Bruce Eikenberg of the Agency. The Agency may change the TO Manager at any time by written notice to the TO Contractor.
 - h. “TO Proposal - Technical” means the TO Contractor’s technical response to the CATS TORFP dated date of TO Proposal – Technical.
 - i. “TO Proposal – Financial” means the TO Contractor’s financial response to the CATS TORFP dated date of TO Proposal - Financial.
 - j. “TO Proposal” collectively refers to the TO Proposal – Technical and TO Proposal – Financial.
2. Scope of Work
 - 2.1 This TO Agreement incorporates all of the terms and conditions of the Master Contract and shall not in any way amend, conflict with or supersede the Master Contract.
 - 2.2 The TO Contractor shall, in full satisfaction of the specific requirements of this TO Agreement, provide the services set forth in Section 2 of the CATS TORFP. These services shall be provided in accordance with the Master Contract, this TO Agreement, and the following Exhibits, which are attached and incorporated herein by reference. If there is any conflict among the Master Contract, this TO Agreement, and these Exhibits, the terms of the Master Contract shall govern. If there is any conflict between this TO Agreement and any of these Exhibits, the following order of precedence shall determine the prevailing provision:
 - a. The TO Agreement,
 - b. Exhibit A – CATS TORFP
 - c. Exhibit B – TO Proposal-Technical
 - d. Exhibit C – TO Proposal-Financial

2.3 The TO Procurement Officer may, at any time, by written order, make changes in the work within the general scope of the TO Agreement. No other order, statement or conduct of the TO Procurement Officer or any other person shall be treated as a change or entitle the TO Contractor to an equitable adjustment under this Section. Except as otherwise provided in this TO Agreement, if any change under this Section causes an increase or decrease in the TO Contractor's cost of, or the time required for, the performance of any part of the work, whether or not changed by the order, an equitable adjustment in the TO Agreement price shall be made and the TO Agreement modified in writing accordingly. The TO Contractor must assert in writing its right to an adjustment under this Section within thirty (30) days of receipt of written change order and shall include a written statement setting forth the nature and cost of such claim. No claim by the TO Contractor shall be allowed if asserted after final payment under this TO Agreement. Failure to agree to an adjustment under this Section shall be a dispute under the Disputes clause of the Master Contract. Nothing in this Section shall excuse the TO Contractor from proceeding with the TO Agreement as changed.

3. Time for Performance

Unless terminated earlier as provided in the Master Contract, the TO Contractor shall provide the services described in the TO Proposal and in accordance with the CATS TORFP on receipt of a Notice to Proceed from the TO Manager. The term of this TO Agreement is for a period of three months, commencing on the date of Notice to Proceed and terminating on **Month Day, Year**.

4. Consideration and Payment

- 4.1 The consideration to be paid the TO Contractor shall be done so in accordance with the CATS TORFP and shall not exceed \$**total amount of task order**. Any work performed by the TO Contractor in excess of the not-to-exceed ceiling amount of the TO Agreement without the prior written approval of the TO Manager is at the TO Contractor's risk of non-payment.
- 4.2 Payments to the TO Contractor shall be made as outlined Section 2 of the CATS TORFP, but no later than thirty (30) days after the Agency's receipt of an invoice for services provided by the TO Contractor, acceptance by the Agency of services provided by the TO Contractor, and pursuant to the conditions outlined in Section 4 of this Agreement.
- 4.3 Each invoice for services rendered must include the TO Contractor's Federal Tax Identification Number which is **Federal ID number**. Charges for late payment of invoices other than as prescribed by Title 15, Subtitle 1, of the State Finance and Procurement Article, Annotated Code of Maryland, as from time-to-time amended, are prohibited. Invoices must be submitted to the Agency TO Manager unless otherwise specified herein.
- 4.4 In addition to any other available remedies, if, in the opinion of the TO Procurement Officer, the TO Contractor fails to perform in a satisfactory and timely manner, the TO Procurement Officer may refuse or limit approval of any invoice for payment, and may cause payments to the TO Contractor to be reduced or withheld until such time as the TO Contractor meets performance standards as established by the TO Procurement Officer.

IN WITNESS THEREOF, the parties have executed this TO Agreement as of the date hereinabove set forth.

TO Contractor Name

By: Type or Print TO Contractor POC

Date

Witness: _____

STATE OF MARYLAND, DBM/OIT

By: Gisela Blades, TO Procurement Officer

Date

Witness: _____

ATTACHMENT 4 – CONFLICT OF INTEREST AFFIDAVIT AND DISCLOSURE

- A) "Conflict of interest" means that because of other activities or relationships with other persons, a person is unable or potentially unable to render impartial assistance or advice to the State, or the person's objectivity in performing the contract work is or might be otherwise impaired, or a person has an unfair competitive advantage.
- B) "Person" has the meaning stated in COMAR 21.01.02.01B(64) and includes a bidder, Offeror, Contractor, consultant, or subcontractor or subconsultant at any tier, and also includes an employee or agent of any of them if the employee or agent has or will have the authority to control or supervise all or a portion of the work for which a bid or offer is made.
- C) The bidder or Offeror warrants that, except as disclosed in §D, below, there are no relevant facts or circumstances now giving rise or which could, in the future, give rise to a conflict of interest.
- D) The following facts or circumstances give rise or could in the future give rise to a conflict of interest (explain in detail—attach additional sheets if necessary):
- E) The bidder or Offeror agrees that if an actual or potential conflict of interest arises after the date of this affidavit, the bidder or Offeror shall immediately make a full disclosure in writing to the procurement officer of all relevant facts and circumstances. This disclosure shall include a description of actions which the bidder or Offeror has taken and proposes to take to avoid, mitigate, or neutralize the actual or potential conflict of interest. If the contract has been awarded and performance of the contract has begun, the Contractor shall continue performance until notified by the procurement officer of any contrary action to be taken.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

Date: _____ By: _____

(Authorized Representative and Affiant)

SUBMIT AS A .PDF FILE WITH TO RESPONSE

ATTACHMENT 5 – LABOR CLASSIFICATION PERSONNEL RESUME SUMMARY

INSTRUCTIONS:

1. Master Contractors must comply with all personnel requirements under the Master Contract RFP 050R5800338.
2. Only labor categories proposed in the Master Contractors Financial Proposal may be proposed under the CATS TORFP process.
3. For each person proposed in any of the labor categories, complete one Labor Category Personnel Resume Summary to document how the proposed person meets each of the minimum requirements. This summary is required at the time of the interview.

For example: If you propose John Smith, who is your subcontractor, and you believe he meets the requirements of the Group Facilitator, you will complete the top section of the form by entering John Smith's name and the subcontractor's company name. You will then complete the right side of the Group Facilitator form documenting how the individual meets each of the requirements. Where there is a time requirement such as three months experience, you must provide the dates from and to showing an amount of time that equals or exceeds mandatory time requirement; in this case, three months.

4. Each form also includes examples of duties to perform. The proposed person must be able to fulfill those duties.
5. For each subject matter expert, the State will identify the particular area of expertise and the Master Contractor shall provide proof the individual has qualifications within that area of expertise.
6. Additional information may be attached to each Labor Category Personnel Resume Summary that may assist a full and complete understanding of the individual being proposed.

ATTACHMENT 6 – DIRECTIONS
TO THE PRE-TO PROPOSAL CONFERENCE

1. Take I-97 off the Baltimore Beltway heading south to Annapolis.
2. I-97 will end and turn into Route 50 East.
3. Take Rowe Blvd. exit toward downtown Annapolis.

From the Eastern Shore or Route 2:

1. Cross the Severn River Bridge and exit on Rowe Blvd.

From Either Direction:

1. Follow Rowe Blvd. to the third traffic light.
2. Stay to the right when the road splits before the Treasury Building.
3. Turn right onto Calvert St.
4. 45 Calvert Street is the first building immediately on the right.
5. Signs will be posted with conference room #.
6. Stop and register with the Security Guard; you will be directed to Room 164.

Parking:

The closest garage is next to 45 Calvert St. but must be entered from Clay St. This is the second right turn after turning onto Calvert St. Turn right onto Clay St. immediately after passing 45 Calvert St.

Another garage is available about a half of a block down from 45 Calvert St. on the left, called Gotts' Garage.

There is also limited metered parking available on Calvert and surrounding streets.

ATTACHMENT 7 – AGENCY RECEIPT OF DELIVERABLE FORM

I acknowledge receipt of the following:

TORFP Title: State of Maryland Messaging Consolidation

TO Agreement Number: #F10P8201021

Title of Deliverable: _____

TORFP Reference Section # _____

Deliverable Reference ID # _____

Name of TO Manager: Bruce Eikenberg

TO Manager Signature

Date Signed

Name of TO Contractor's Project Manager: _____

TO Contractor's Project Manager Signature

Date Signed

SUBMIT AS REQUIRED IN SECTION 2.2.2 OF THE TORFP.

ATTACHMENT 8 – AGENCY ACCEPTANCE OF DELIVERABLE FORM

Agency Name: DBM/OIT

TORFP Title: State of Maryland Messaging Consolidation

TO Manager: Bruce Eikenberg, 410-260-7307

To:

The following deliverable, as required by TO Agreement #F10P8201021, has been received and reviewed in accordance with the TORFP.

Title of deliverable: _____

TORFP Contract Reference Number: Section # _____

Deliverable Reference ID # _____

This deliverable:

Is accepted as delivered.

Is rejected for the reason(s) indicated below.

REASON(S) FOR REJECTING DELIVERABLE:

OTHER COMMENTS:

TO Manager Signature

Date Signed

ISSUED BY THE TO MANAGER AS REQUIRED IN SECTION 2.2.2 OF THE TORFP.

ATTACHMENT 9 – NON-DISCLOSURE AGREEMENT (OFFEROR)

This Non- Disclosure Agreement (the "Agreement") is made this ___ day of _____ 200_, by and between _____ (hereinafter referred to as "the OFFEROR ") and the State of Maryland (hereinafter referred to as " the State").

OFFEROR warrants and represents that it intends to submit a TO Proposal in response to CATS TORFP #F10P8201021 for State of Maryland Messaging Consolidation. In order for the OFFEROR to submit a TO Proposal, it will be necessary for the State to provide the OFFEROR with access to certain confidential information including, but not limited, to _____. All such information provided by the State shall be considered Confidential Information regardless of the form, format, or media upon which or in which such information is contained or provided, regardless of whether it is oral, written, electronic, or any other form, and regardless of whether the information is marked as "Confidential Information". As a condition for its receipt and access to the Confidential Information described in Section 1.7 of the TORFP, OFFEROR agrees as follows:

1. OFFEROR will not copy, disclose, publish, release, transfer, disseminate or use for any purpose in any form any Confidential Information received under Section 1.8, except in connection with the preparation of its TO Proposal.
2. Each employee or agent of the OFFEROR who receives or has access to the Confidential Information shall execute a copy of this Agreement and the OFFEROR shall provide originals of such executed Agreements to the State. Each employee or agent of the OFFEROR who signs this Agreement shall be subject to the same terms, conditions, requirements and liabilities set forth herein that are applicable to the OFFEROR.
3. OFFEROR shall return the Confidential Information to the State within five business days of the State's Notice of recommended award. If the OFFEROR does not submit a Proposal, the OFFEROR shall return the Confidential Information to Gisela Blades, DBM/OIT on or before the due date for Proposals.
4. OFFEROR acknowledges that the disclosure of the Confidential Information may cause irreparable harm to the State and agrees that the State may obtain an injunction to prevent the disclosure, copying, or other impermissible use of the Confidential Information. The State's rights and remedies hereunder are cumulative and the State expressly reserves any and all rights, remedies, claims and actions that it may have now or in the future to protect the Confidential Information and/or to seek damages for the OFFEROR'S failure to comply with the requirements of this Agreement. The OFFEROR consents to personal jurisdiction in the Maryland State Courts.
5. In the event the State suffers any losses, damages, liabilities, expenses, or costs (including, by way of example only, attorneys' fees and disbursements) that are attributable, in whole or in part to any failure by the OFFEROR or any employee or agent of the OFFEROR to comply with the requirements of this Agreement, OFFEROR and such employees and agents of OFFEROR shall hold harmless and indemnify the State from and against any such losses, damages, liabilities, expenses, and/or costs.
6. This Agreement shall be governed by the laws of the State of Maryland.
7. OFFEROR acknowledges that pursuant to Section 11-205.1 of the State Finance and Procurement Article of the Annotated Code of Maryland, a person may not willfully make a false or fraudulent statement or representation of a material fact in connection with a procurement contract. Persons making such statements are guilty of a felony and on conviction subject to a fine of not more than \$20,000 and/or imprisonment not exceeding 5 years or both. OFFEROR further acknowledges that this Agreement is a statement made in connection with a procurement contract.
8. The individual signing below warrants and represents that they are fully authorized to bind the OFFEROR to the terms and conditions specified in this Agreement. If signed below by an individual employee or agent of the OFFEROR under Section 2 of this Agreement, such individual acknowledges that a failure to comply with the requirements specified in this Agreement may result in personal liability.

OFFEROR: _____ BY: _____
NAME: _____ TITLE: _____
ADDRESS: _____

SUBMIT AS REQUIRED IN SECTION 1.8 OF THE TORFP

ATTACHMENT 10 – NON-DISCLOSURE AGREEMENT (TO CONTRACTOR)

THIS NON-DISCLOSURE AGREEMENT (“Agreement”) is made as of this ____ day of _____, 200____, by and between the State of Maryland (“the State”), acting by and through its DBM/OIT (the “Department”), and _____ (“TO Contractor”), a corporation with its principal business office located at _____ and its principal office in Maryland located at _____.

RECITALS

WHEREAS, the TO Contractor has been awarded a Task Order Agreement (the “TO Agreement”) for State of Maryland Messaging Consolidation TORFP No. F10P8201021 dated **release date for TORFP**, (the “TORFP”) issued under the Consulting and Technical Services procurement issued by the Department, Project Number 050R5800338; and

WHEREAS, in order for the TO Contractor to perform the work required under the TO Agreement, it will be necessary for the State to provide the TO Contractor and the TO Contractor’s employees and agents (collectively the “TO Contractor’s Personnel”) with access to certain confidential information regarding _____ (the “Confidential Information”).

NOW, THEREFORE, in consideration of being given access to the Confidential Information in connection with the TORFP and the TO Agreement, and for other good and valuable consideration, the receipt and sufficiency of which the parties acknowledge, the parties do hereby agree as follows:

1. Confidential Information means any and all information provided by or made available by the State to the TO Contractor in connection with the TO Agreement, regardless of the form, format, or media on or in which the Confidential Information is provided and regardless of whether any such Confidential Information is marked as such. Confidential Information includes, by way of example only, information that the TO Contractor views, takes notes from, copies (if the State agrees in writing to permit copying), possesses or is otherwise provided access to and use of by the State in relation to the TO Agreement.
2. TO Contractor shall not, without the State’s prior written consent, copy, disclose, publish, release, transfer, disseminate, use, or allow access for any purpose or in any form, any Confidential Information provided by the State except for the sole and exclusive purpose of performing under the TO Agreement. TO Contractor shall limit access to the Confidential Information to the TO Contractor’s Personnel who have a demonstrable need to know such Confidential Information in order to perform under the TO Agreement and who have agreed in writing to be bound by the disclosure and use limitations pertaining to the Confidential Information. The names of the TO Contractor’s Personnel are attached hereto and made a part hereof as Exhibit A. Each individual whose name appears on Exhibit A shall execute a copy of this Agreement and thereby be subject to the terms and conditions of this Agreement to the same extent as the TO Contractor. TO Contractor shall update Exhibit A by adding additional names as needed, from time to time.
3. If the TO Contractor intends to disseminate any portion of the Confidential Information to non-employee agents who are assisting in the TO Contractor’s performance of the TORFP or who will otherwise have a role in performing any aspect of the TORFP, the TO Contractor shall first obtain the written consent of the State to any such dissemination. The State may grant, deny, or condition any such consent, as it may deem appropriate in its sole and absolute subjective discretion.
4. TO Contractor hereby agrees to hold the Confidential Information in trust and in strictest confidence, to adopt or establish operating procedures and physical security measures, and to take all other measures necessary to protect the Confidential Information from inadvertent release or disclosure to unauthorized third parties and to prevent all or any portion of the Confidential Information from falling into the public domain or into the possession of persons not bound to maintain the confidentiality of the Confidential Information.
5. TO Contractor shall promptly advise the State in writing if it learns of any unauthorized use, misappropriation, or disclosure of the Confidential Information by any of the TO Contractor’s Personnel or the TO Contractor’s former Personnel. TO Contractor shall, at its own expense, cooperate with the State in seeking injunctive or other equitable relief against any such person(s).
6. TO Contractor shall, at its own expense, return to the Department, all copies of the Confidential Information in its care, custody, control or possession upon request of the Department or on termination of the TO Agreement.
7. A breach of this Agreement by the TO Contractor or by the TO Contractor’s Personnel shall constitute a breach of the TO Agreement between the TO Contractor and the State.

8. TO Contractor acknowledges that any failure by the TO Contractor or the TO Contractor's Personnel to abide by the terms and conditions of use of the Confidential Information may cause irreparable harm to the State and that monetary damages may be inadequate to compensate the State for such breach. Accordingly, the TO Contractor agrees that the State may obtain an injunction to prevent the disclosure, copying or improper use of the Confidential Information. The TO Contractor consents to personal jurisdiction in the Maryland State Courts. The State's rights and remedies hereunder are cumulative and the State expressly reserves any and all rights, remedies, claims and actions that it may have now or in the future to protect the Confidential Information and/or to seek damages from the TO Contractor and the TO Contractor's Personnel for a failure to comply with the requirements of this Agreement. In the event the State suffers any losses, damages, liabilities, expenses, or costs (including, by way of example only, attorneys' fees and disbursements) that are attributable, in whole or in part to any failure by the TO Contractor or any of the TO Contractor's Personnel to comply with the requirements of this Agreement, the TO Contractor shall hold harmless and indemnify the State from and against any such losses, damages, liabilities, expenses, and/or costs.
9. TO Contractor and each of the TO Contractor's Personnel who receive or have access to any Confidential Information shall execute a copy of an agreement substantially similar to this Agreement and the TO Contractor shall provide originals of such executed Agreements to the State.
10. The parties further agree that:
 - a. This Agreement shall be governed by the laws of the State of Maryland;
 - b. The rights and obligations of the TO Contractor under this Agreement may not be assigned or delegated, by operation of law or otherwise, without the prior written consent of the State;
 - c. The State makes no representations or warranties as to the accuracy or completeness of any Confidential Information;
 - d. The invalidity or unenforceability of any provision of this Agreement shall not affect the validity or enforceability of any other provision of this Agreement;
 - e. Signatures exchanged by facsimile are effective for all purposes hereunder to the same extent as original signatures; and
 - f. The Recitals are not merely prefatory but are an integral part hereof.

TO Contractor/TO Contractor's Personnel:

TO Requesting Agency: DBM/OIT

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

SUBMIT AS REQUIRED IN SECTION 1.8 OF THE TORFP

EXHIBIT A

**TO CONTRACTOR'S EMPLOYEES AND AGENTS WHO WILL BE GIVEN
ACCESS TO THE CONFIDENTIAL INFORMATION**

Printed Name and Address
of Employee or Agent

Signature

Date

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

ATTACHMENT 11 – AGENCY MESSAGING SYSTEM SURVEY QUESTION

1. Agency Information

Full Agency Name

Email Administrator's Name

Administrator's Phone Number

Administrator's Email

2. Do you receive email service from another State department/agency?

3. List the full name of the State department/agency that provides your email service.

4. Do you provide email service to another State department/agency(s)? If so, please include the department/agency(s) email information in your submission.

5. List the full name of the State department/agency(s) in which you provide email service.

6. On average, how often do you perform upgrades or make changes to your email system?

(i.e. patches, version upgrades, add-ins, updates, etc...) Pick from the following list:

Daily

Twice Weekly

Weekly

Bi-Weekly

Monthly

Quarterly

Yearly

7. Do you have a maintenance contract for the day-to-day support of your email system?*

Yes

No

8. The date the contract expires (mm/dd/yyyy).

9. The dollar value of the contract.

10. The number of hours/week associated to handling the day-to-day operations of the system.

These hours can be spread over multiple people. For example, you could have 4 people that support the system part time. One person spends on average 10 hours a week monitoring system logs, implementing patches/upgrades, managing backups, and responding to end user issues, 3 other people spend on average .5 hours each, adding/deleting users and responding to end user issues. This would mean that you would have 11.5 hours/week dedicated to supporting the day-to-day operations of the system.

11. The estimated annual recurring cost associated with the software and hardware that support the agency's email system. This would include items such as; annual maintenance fees on hardware (i.e. email servers, mobile messaging servers) software (i.e. email, email virus scanning, spam filtering) and annual email outsource costs (i.e. outsourced email virus scanning and/or spam filtering, contractor support of the email system).

12. This is the number of mail enabled mailboxes that are set up within the email system.

13. What is the average storage space for a mailbox in MB?

14. What is the total database size for the current email system in GB?

15. What is the total current archive database size for the email system in GB?

16. Select the method used to verify the user is who they claim to be.

Application

LDAP

Kerberos

Windows

Unix

Linux

Mainframe

TACAS

N/A

Other, please specify

17. How do you allow your users to access your email system?

End users access only through an email client.

End users access only through a web browser.

End users access either email client or web browser.

18. Select the protocol(s) used in your email system.

pop3

smtp

http

https

https over RCP

imap4

nntp

Other, please specify

19. Select the Format associated to the email system backup.

Disk

Tape

Virtual Disk

Other, please specify

20. Do you have an email retention policy?

21. Provide a summary of your email retention policy (i.e., email is to be deleted 30 days from when it is received).

22. Select the feature(s) that must be available in the mobile device for your agency's business purpose.

GPS

Camera

Webaccess

Phone

Email

Address book

alendar

Bluetooth

Wi-Fi

Push-to-Talk

Pin-to-Pin

Attachment Viewing

N/A

Other, please specify

23. Select the Electronic Messaging Client(s) used by your email system.

MICROSOFT OUTLOOK 6.0
MICROSOFT OUTLOOK 2002
MICROSOFT OUTLOOK 2003
MICROSOFT OUTLOOK 2007
MICROSOFT OUTLOOK 5.5
MICROSOFT OUTLOOK 6.0
NOVELL GROUPWISE 5.0
NOVELL GROUPWISE 5.2
NOVELL GROUPWISE 5.5
NOVELL GROUPWISE 6.0
NOVELL GROUPWISE 6.5
NOVELL GROUPWISE 7.0
EUDORA EUDORA 6.2
EUDORA EUDORA 7.1
MOZILLA MOZILLA THUNDERBIRD 1.0
MOZILLA MOZILLA THUNDERBIRD 2.0
MICROSOFT OUTLOOK EXPRESS 5.5
MICROSOFT OUTLOOK EXPRESS 6.0
MICROSOFT OUTLOOK WEB ACCESS 2000
MOTOROLA GOOD MOBILE MESSAGING CLIENT 1.0
MOTOROLA GOOD MOBILE MESSAGING CLIENT 3.0
MOTOROLA GOOD MOBILE MESSAGING CLIENT 3.7
MOTOROLA GOOD MOBILE MESSAGING CLIENT 4.0
NOVELL GROUPWISE MOBILE SERVER 7.0
SILVERLAKE COMMUNICATIONS AIRSOURCE PRO
SOUTH PACIFIC INFORMATION SERVICE TURBONOTE+
TURBONOTE TURBONOTE 5.3
N/A
Other, please specify

24. Select the Electronic Messaging Server(s) used by your email system.

MICROSOFT EXCHANGE SERVER 2000
MICROSOFT EXCHANGE SERVER 2003
MICROSOFT EXCHANGE SERVER 5.5
MICROSOFT EXCHANGE SERVER 2007
NOVELL GROUPWISE 5.0

NOVELL GROUPWISE 5.2
NOVELL GROUPWISE 5.5
NOVELL GROUPWISE 6.0
NOVELL GROUPWISE 6.5
NOVELL GROUPWISE 7.0
RIM BLACKBERRY ENTERPRISE SERVER FOR EXCHANGE 3.6
RIM BLACKBERRY ENTERPRISE SERVER FOR EXCHANGE 4.1
RIM BLACKBERRY ENTERPRISE SERVER FOR NOVELL GROUPWISE 4.0
RIM BLACKBERRY ENTERPRISE SERVER FOR NOVELL GROUPWISE 4.1
MOTOROLA GOOD MOBILE MESSAGING SERVER 4.9
SILVERLAKE COMMUNICATIONS AIRSOURCE WEB
BISCOM FAXCOM 4000
IPSWITCH IMAIL SERVER 8.0
MERAK ICEWARP 8.0.2
N/A
Other, please specify

25. List the number of licenses you have for the product(s) listed in previous question.

First Product
Second Product
Third Product
Fourth Product

26. Select the Authentication product(s) used by your email system.

MICROSOFT ACTIVE DIRECTORY 2003
NOVELL EDIRECTORY 8.6
NOVELL EDIRECTORY 8.7
NOVELL EDIRECTORY 8.8
CISCO CISCO SECURE ACS FOR WINDOWS 3.2
CISCO CISCO SECURE ACS FOR WINDOWS 3.3
CISCO CISCO SECURE ACS FOR WINDOWS 3.5
COMPUTER ASSOCIATES ETRUST ACF2 SECURITY 6.4
COMPUTER ASSOCIATES ETRUST CA-ACF2 CICS INTERFACE 6.5
COMPUTER ASSOCIATES ETRUST CA ACF2 SECURITY FOR Z/OS AND OS/390
COMPUTER ASSOCIATES ETRUST CA-TOP SECRET SECURITY 5.3
IDENTIX TOUCHPRINT 600
MICROSOFT CHALLENGE HANDSHAKE AUTHENTICATION PROTOCOL 2.0

MICROSOFT WINDOWS INTERNET AUTHENTICATION SERVICE

NOVELL ACCOUNT MANAGER 2.0

RSASECURITY ACE/CLIENT FOR WINDOWS NT 4.0

RSASECURITY ACE/CLIENT FOR WINDOWS NT 4.0

RSASECURITY RSA SECURITY CLEARTRUST 5.5

RSASECURITY RSA SECURITY KEON CA SYSTEM 6.5

RSASECURITY SECURID APPLIANCE

SOFTWARE HOUSE CCURE 800

N/A

Other, please specify

27. Select the Virus Protection/Spam Control product(s) used by your email system.

CLEARSWIFT MIMESWEEPER EMAIL APPLIANCE

COMPUTER ASSOCIATES ETRUST ANTIVIRUS 7.0

COMPUTER ASSOCIATES ETRUST ANTIVIRUS 7.1

GRISOFT AVG ANTI-VIRUS 7.0

GWAVA GUINEVIERE 3

GWAVA WASP 2.5

MCAFEE EPOLICY ORCHESTRATOR 3.5

MCAFEE NETSHIELD FOR NETWARE 4.6.3

MCAFEE VIREX FOR MACINTOSH

MCAFEE VIRUSSCAN 5.0

MCAFEE VIRUSSCAN 6.0

MCAFEE VIRUSSCAN ASAP 2.5

MCAFEE VIRUSSCAN ENTERPRISE 7.0

MCAFEE VIRUSSCAN ENTERPRISE 7.1

MCAFEE VIRUSSCAN ENTERPRISE 8.0

MCAFEE VIRUSSCAN ENTERPRISE 8.5

MCAFEE WEBSHIELD ESERIES APPLIANCE E500

PANDA SECURITY ADMINSECURE 4.02

PANDA SECURITY EXCHANGESECURE 3.10

SYMANTEC CLIENT SECURITY 2.0

SYMANTEC CLIENT SECURITY 9.0

SYMANTEC NORTON ANTIVIRUS 10.1

SYMANTEC NORTON ANTIVIRUS 2000

SYMANTEC NORTON ANTIVIRUS 2001

SYMANTEC NORTON ANTIVIRUS 2002

SYMANTEC NORTON ANTIVIRUS 2004
SYMANTEC NORTON ANTIVIRUS 4.0
SYMANTEC NORTON ANTIVIRUS 6.0
SYMANTEC NORTON ANTIVIRUS 7.6
SYMANTEC NORTON ANTIVIRUS 8.0
SYMANTEC NORTON ANTIVIRUS 8.1
SYMANTEC NORTON ANTIVIRUS 9.0
SYMANTEC NORTON ANTIVIRUS 10.0
SYMANTEC NORTON ANTIVIRUS 9.0 WIN64
SYMANTEC NORTON ANTIVIRUS 9.2
SYMANTEC NORTON ANTIVIRUS CE DESKTOPS AND FILE SERVERS 9.0
SYMANTEC NORTON ANTIVIRUS CENTRAL QUARANTINE 3.0
SYMANTEC NORTON ANTIVIRUS CENTRAL QUARANTINE 3.2
SYMANTEC NORTON ANTIVIRUS QUARANTINE CONSOLE SNAP-IN 3.2
SYMANTEC NORTON ANTIVIRUS 9.0 FOR EXCHANGE 2000 SERVER 3.0
SYMANTEC NORTON ANTIVIRUS 9.0 FOR EXCHANGE 2003 SERVER
SYMANTEC MAIL SECURITY FOR MICROSOFT EXCHANGE 5.0
SYMANTEC MAIL SECURITY FOR MICROSOFT EXCHANGE 6.0
SYMANTEC NORTON SYSTEMWORKS 2001
SYMANTEC NORTON SYSTEMWORKS 2003
SYMANTEC NORTON UTILITIES 2001
TUCOWS MAIL INSPECTOR 2004
IRONPORT IRONPORT C10
IRONPORT SYMANTEC BRIGHTMAIL ANTI-SPAM
MICROSOFT INTELLIGENT MESSAGE FILTER FOR MICROSOFT EXCHANGE 2003
SOLID OAK SOFTWARE ALLIGATE 1.49
SPAM ASSASSIN.ORG SPAM ASSASSIN 2.64
SPAM ASSASSIN.ORG SPAM ASSASSIN 3.0
SYMANTEC BRIGHTMAIL ANTI-SPAM 6.0
SYMANTEC PREMIUM ANTI-SPAM ADD-ON TO MAIL SECURITY 5.0
TUMBLEWEED MAILGATE EMAIL FIREWALL (EMF) 6.3
TUMBLEWEED MAILGATE 3.12
N/A

Other, please specify

28. Select the Server OS used by your email system.

HP/COMPAQ OPENVMS

HP/COMPAQ TRU64 UNIX 5.1B

IBM AIX 4.3
IBM AIX 5.1
IBM AIX 5.2
MICROSOFT WINDOWS NT 4.0 SERVER
MICROSOFT WINDOWS 2000 ADVANCED SERVER
MICROSOFT WINDOWS 2000 SERVER
MICROSOFT WINDOWS 2003 SERVER
NOVELL INTRANETWARE 4.11
NOVELL NETWARE 3.2
NOVELL NETWARE 4.1
NOVELL NETWARE 4.11
NOVELL NETWARE 4.2
NOVELL NETWARE 5.0
NOVELL NETWARE 5.1
NOVELL NETWARE 6.0
NOVELL NETWARE 6.1
NOVELL NETWARE 6.5
NOVELL SUSE LINUX ENTERPRISE SERVER 9.0
NOVELL SUSE LINUX ENTERPRISE SERVER 10.0
REDHAT LINUX 6.2
REDHAT LINUX 7.3
REDHAT LINUX 9.0
REDHAT ENTERPRISE LINUX AS 4.0
REDHAT ENTERPRISE LINUX 3.0
REDHAT ENTERPRISE LINUX 4.0
REDHAT ENTERPRISE LINUX 5.0
SILICON GRAPHICS IRIX 6.5
SLACKWARE LINUX 10.0
SUN SOLARIS 2.6
SUN SOLARIS 7.0
SUN SOLARIS 8.0
SUN SOLARIS 9.0
SUN SOLARIS 10.0
FEDORA CORE 1
N/A
Other, please specify

29. Select the Encryption product(s) used by your email system.

CHECK POINT SOFTWARE TECHNOLOGIES LTD. POINTSEC PC 6.1.3

NORTEL SSL ACCELERATOR

PGP DESKTOP PROFESSIONAL 9.0

VERISIGN SECURE SOCKET LAYER CERTIFICATE

TUMBLEWEED SECURE MESSENGER 6.3

TUMBLEWEED MARK SECURE 1.0

N/A

Other, please specify

30. Select the Backup and Recovery product(s) used by your email system.

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP 9.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP AGENT FOR MICROSOFT SQL SERVER 11.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP AGENT FOR MICROSOFT SQL SERVER 9.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP AGENT FOR ORACLE 11.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP AGENT FOR ORACLE 11.1

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP AGENT FOR ORACLE 9.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR LAPTOPS AND DESKTOPS 11.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR NETWARE 11.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR NETWARE 11.5

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR NETWARE 7.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR NETWARE 9.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR WINDOWS 11.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR WINDOWS 11.0 AGENT

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR WINDOWS 11.0 AGENT FOR OPEN WINDOWS FILES

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR WINDOWS 11.1

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP FOR WINDOWS 9.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP STORAGE AREA NETWORK [SAN] OPTION 11.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE BACKUP TAPE LIBRARY OPTION 11.1

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE DISASTER RECOVERY OPTION 11.0

COMPUTER ASSOCIATES BRIGHTSTOR ARCSERVE FOR LINUX 11.1

COMPUTER ASSOCIATES BRIGHTSTOR CA-1 TAPE MANAGEMENT 5.2

COMPUTER ASSOCIATES BRIGHTSTOR ENTERPRISE BACKUP 10.5
FREEBYTE FREEBYTE BACKUP 2.4
IBM TIVOLI STORAGE MANAGER EXTENDED EDITION 5.4
IBM TIVOLI STORAGE MANAGER FOR DATABASES 5.3
IBM TIVOLI STORAGE MANAGER FOR MAIL 5.3
IBM TIVOLI STORAGE MANAGER FOR SAN 5.4
MIRRA BACK-UP SYSTEM M-120
MOON BACKUP MAGIC 1.6
NERO 7 ULTRA EDITION
NERO NERO BURNING ROM 6.3
QUANTUM ATL M1500
SUN STORAGETEK HOST SOFTWARE COMPONENT [HSC] 5.1
SYMANTEC BACKUP EXEC FOR NETWARE 8.0
SYMANTEC BACKUP EXEC FOR NETWARE 9.0
SYMANTEC BACKUP EXEC FOR NETWARE 9.1
SYMANTEC BACKUP EXEC FOR NETWARE 9.2
SYMANTEC BACKUP EXEC FOR WINDOWS SERVERS 8.0
SYMANTEC BACKUP EXEC FOR WINDOWS SERVERS 8.6
SYMANTEC BACKUP EXEC FOR WINDOWS SERVERS 9.0
SYMANTEC BACKUP EXEC FOR WINDOWS SERVERS 9.1
SYMANTEC BACKUP EXEC FOR WINDOWS SERVERS 10D
SYMANTEC BACKUP EXEC FOR WINDOWS SERVERS 11D
SYMANTEC BACKUP EXEC FOR WINDOWS SERVERS 12
SYMANTEC BACKUP EXEC OPEN FILE OPTION 8.0
SYMANTEC BACKUP EXEC REMOTE AGENT FOR WINDOWS SERVERS 9.1
SYMANTEC NETBACKUP 4.5
SYMANTEC NETBACKUP 6.0
SYMANTEC NORTON GHOST 7.0
SYMANTEC NORTON GHOST 8.0
SYMANTEC NORTON GHOST 8.2
N/A
Other, please specify

31. Select the Storage Area Network (SAN) product(s) used by your email system.

EMC CLARIION CX300
EMC CLARIION CX3-80
EMC CLARION CX500

EMC CX400 NAVISPHERE MANAGER
EMC CX400 POWERPATH
EMC SRDF/ASYNCHRONOUS
EMC SYMMETRIX 5390
EMC SYMMETRIX 8430
EMC SYMMETRIX DMX1000
HP/COMPAQ AH-1000
HP/COMPAQ HSG80
HP/COMPAQ M2200
HP/COMPAQ STORAGEWORKS ENCLOSURE 4314R
HP/COMPAQ STORAGEWORKS ENTERPRISE VIRTUAL ARRAY 5000 2C2D
HP/COMPAQ STORAGEWORKS ENTERPRISE VIRTUAL ARRAY 5000 2C6D
HP/COMPAQ STORAGEWORKS MODULAR SAN ARRAY 1000
HP/COMPAQ STORAGEWORKS NETWORK STORAGE ROUTER N1200
HP/COMPAQ STORAGEWORKS RA4100
HP/COMPAQ STORAGEWORKS SANWORKS SECURE PATH 3.1A
HP/COMPAQ STORAGEWORKS SECURE PATH 4.0 FOR WINDOWS
IBM 2109-S16 SAN FIBRE CHANNEL SWITCH
IBM SAN DATA GATEWAY ROUTER 2108 MODEL R3L [2108-R3L]
NOVELL CLUSTER SERVICES 1.1
NOVELL CLUSTER SERVICES 1.6
SUN STORAGETEK EXPERT LIBRARY MANAGER
SUN STORAGETEK SCS 5.1
SUN STORAGETEK SMC 5.1
SUN STORAGETEK SOS 5.1
N/A
Other, please specify

32. Select the Storage Device product(s) used by your email system.

ADIC FASTSTOR 2
ADIC FASTSTOR 22
ADIC FASTSTOR 7
ADIC SCALAR 100
ADIC VLS DLT400
ADIC VLS DLT700
AMACOM BABY CDRW
CYBERNETICS CY-8000

CYBERNETICS CY-8960-01
CYBERNETICS CY-TL8-215
CYBERNETICS INTEGRAL 100-300GB AIT-3
DELL POWERVAULT 100T
DELL POWERVAULT 110T
DELL POWERVAULT 110T DLT
DELL POWERVAULT 110T LTO
DELL POWERVAULT 120T
DELL POWERVAULT 122T
DELL POWERVAULT 132T
DELL POWERVAULT 136T
DELL POWERVAULT 200S
DELL POWERVAULT 220S
DELL POWERVAULT 715N
DELL POWERVAULT 725N
HITACHI LIGHTNING 9960
HP/COMPAQ DLT 15/30 GB
HP/COMPAQ DLT III TAPE DRIVE
HP/COMPAQ DLT TAPE IV DRIVE
HP/COMPAQ DLT VS80 TAPE ARRAY 5300/5500
HP/COMPAQ STORAGEWORKS DLT 40/80 GB
HP/COMPAQ STORAGEWORKS MSL5026
HP/COMPAQ STORAGEWORKS MSL5026 DLT
HP/COMPAQ STORAGEWORKS MSL5030 DLT
HP/COMPAQ STORAGEWORKS MSL6030 DLT
HP/COMPAQ STORAGEWORKS SDLT 160/320
HP/COMPAQ STORAGEWORKS TL891
HP/COMPAQ STORAGEWORKS TL891DLX
HP/COMPAQ STORAGEWORKS TL895
HP/COMPAQ STORAGEWORKS ULTRIUM 460
HP/COMPAQ STORAGEWORKS ULTRIUM C7147CB
HP/COMPAQ SURESTORE 818 DLT AUTOLOADER
HP/COMPAQ SURESTORE DAT 24X6
HP/COMPAQ SURESTORE DAT40I
HP/COMPAQ SURESTORE DAT72I
HP/COMPAQ SURESTORE DLT80E
IBM 3490-A20

IBM 3490-B40
IBM 3490-E01
IBM 3494
IBM 3502-108
IBM 3502-R14
IBM 3529-51A
IBM 3581-L23
IBM 3582
IBM 3590-A14
IBM 3590-A60
IBM 3590-E1A
IBM 3600-R20
IBM 3746
IBM 3812-2
IBM 3995
IBM 3995-C16
IBM 3995-C18
IBM 3995-C26
IBM 3995-C28
IBM 3995-C36
IBM 3995-C38
IBM 3995-C64
IBM 3995-C68
IBM IBM 3420-6
IBM IBM 3420-8
IBM TOTALSTORAGE 3581 TAPE AUTOLOADER
IOMEGA ZIP 100MB
IOMEGA ZIP 250MB
MICROSOLUTIONS CD-ROM BACK-PACK
QUALSTAR RLS4221
QUANTUM ATL 7100
QUANTUM DAT VALUELOADER SDLT320
QUANTUM DLT-8000
QUANTUM M1500
QUANTUM SDLT320
QUANTUM SDLT 600
QUANTUM SUPERLOADER SDLT320

SEAGATE ARCHIVE PYTHON 4MM
SONY SDX TAPE DRIVE
SONY STORSTATION AITE90-UL
SUN STORAGETEK 4480 AUTOMATED CARTRIDGE SUBSYSTEM
SUN STORAGETEK FLEXLINE FLX 210
SUN STORAGETEK POWDERHORN 9310 TAPE LIBRARY
SUN STORAGETEK WOLKCREEK AUTOCHANGER
SUTUMYN 5490
TELEX MEMOREX 5480
UNISYS DAT TAPE CHANGER
N/A
Other, please specify

33. Select the Browser product(s) your agency supports for access to your email system.

MICROSOFT INTERNET EXPLORER 4.0
MICROSOFT INTERNET EXPLORER 5.0
MICROSOFT INTERNET EXPLORER 5.5
MICROSOFT INTERNET EXPLORER 6.0
MICROSOFT INTERNET EXPLORER 7.0
MOZILLA FIREFOX 1.0
MOZILLA FIREFOX 2.0
MOZILLA MOZILLA 1.0
MOZILLA MOZILLA 1.4
MOZILLA MOZILLA 1.5
MOZILLA MOZILLA 1.7
NETSCAPE ENTERPRISE SERVER 3.6
NETSCAPE NAVIGATOR 4.5
NETSCAPE NAVIGATOR 4.7
NETSCAPE NETSCAPE 6.2
NETSCAPE NETSCAPE 7.0
NETSCAPE NETSCAPE 7.2
NETSCAPE NETSCAPE 8.0
NETSCAPE NETSCAPE 9.0
NETSCAPE SUITESPOT 3.0
NS SYSTEMS LIMITED NETSHIFT 4.5
OPERA BROWSER 6.0
OPERA BROWSER 7.5

REQWIRELESS WEBVIEWER 4.0

N/A

Other, please specify

34. Select the Cell Phone/Wireless PDA product(s) used by your email system.

PALM TREO 600

PALM TREO 650

PALM TREO 700

RIM BLACKBERRY 6750

RIM BLACKBERRY 7280

RIM BLACKBERRY 730

RIM BLACKBERRY 7510

RIM BLACKBERRY 7520

RIM BLACKBERRY 8700C

RIM BLACKBERRY 8703E

RIM BLACKBERRY 950

RIM BLACKBERRY 957M

RIM BLACKBERRY 975

RIM BLACKBERRY CURVE 8300

RIM BLACKBERRY CURVE 8310

N/A

Other, please specify

35. List the number of licenses you have for the product(s) listed in previous question.

First Product

Second Product

Third Product

Fourth Product

36. Select the Mobile Device OS product(s) used to access your email system.

MICROSOFT WINDOWS CE 2.0

MICROSOFT WINDOWS POCKET PC 2000

MICROSOFT WINDOWS MOBILE DEVICE 5.0

RIM BLACKBERRY OS 4.0

RIM BLACKBERRY OS 4.1

RIM BLACKBERRY OS 4.2

N/A

Other, please specify

37. Is your agency currently using VoIP?

Yes

No

38. How many handsets?

39. Are you planning to use VoIP?

If Yes, list number of handsets.

If No, insert N/A.

40. Is your agency currently using Instant Messaging?

Yes

No

41. What method?

42. Is your agency planning to use Instant Messaging?

If Yes, what method?

If No, insert N/A

43. Select the Personal Computer OS product(s) required for access to your email system.

APPLE MAC OS 9.2

APPLE MAC OS X 10.0

APPLE MAC OS X 10.3

MICROSOFT DOS 6.0

MICROSOFT DOS 6.2

MICROSOFT MS-DOS 5.0

MICROSOFT WINDOWS 2000

MICROSOFT WINDOWS 3.1

MICROSOFT WINDOWS 95

MICROSOFT WINDOWS 98

MICROSOFT WINDOWS FOR WORKGROUPS 3.11

MICROSOFT WINDOWS NT 4.0

MICROSOFT WINDOWS XP

REDHAT ENTERPRISE LINUX WS 3.0

N/A

Other, please specify

44. List the vendor name, product name and version of any additional products that are a part of your email system.

First Product

Second Product

Third Product

45. Provide a brief description of the product(s) listed in previous question.

First Product

Second Product

Third Product