



Amendment No. 1
to
Contract No. NA150000088
for
Data Center Relocation Consultant
between
HP Enterprise Services, LLC
and the
City of Austin

- 1.0 The City hereby exercises this extension option for the subject contract. This extension option will be June 9, 2016 through June 8, 2017. No options will remain.
- 2.0 The total contract amount is increased by \$900,000.00 by this extension period. The total contract authorization is recapped below:

Action	Action Amount	Total Contract Amount
Initial Term: 06/09/2015 – 06/08/2016	\$400,000.00	\$400,000.00
Amendment No. 1: Option 1 – Extension 06/09/2016 – 06/08/2017	\$900,000.00	\$1,300,000.00

- 3.0 MBE/WBE goals do not apply to this contract.
- 4.0 By signing this Amendment the Contractor certifies that the vendor and its principals are not currently suspended or debarred from doing business with the Federal Government, as indicated by the GSA List of Parties Excluded from Federal Procurement and Non-Procurement Programs, the State of Texas, or the City of Austin.
- 5.0 All other terms and conditions remain the same.

BY THE SIGNATURES affixed below, this amendment is hereby incorporated into and made a part of the above-referenced contract.

Sign/Date:

05/18/2016

Printed Name: Ernie Sanders

Authorized Representative

HP Enterprise Services, LLC
14231 Tandem Boulevard
Austin, Texas 78728
(512) 522-2416

Sign/Date:

6-2-16

Linell Goodin-Brown
Contract Compliance Supervisor
City of Austin
Purchasing Office
124 W. 8th Street, Ste. 310
Austin, Texas 78701

**CONTRACT BETWEEN THE CITY OF AUSTIN (“City”)
AND
HP ENTERPRISE SERVICES, LLC (“Contractor”)
FOR
DATA CENTER RELOCATION CONSULTANT**

The City accepts the Contractor’s Offer (as referenced in Section 1.1.3 below) for the above requirement and enters into the following Contract.

This Contract is between HP Enterprise Services having offices at 3000 Hanover St. MS 1064, Palo Alto, CA 94304 and the City; a home-rule municipality incorporated by the State of Texas, and is effective as of the date executed by the City (“Effective Date”).

Capitalized terms used but not defined herein have the meanings given them in Solicitation Number SMW0122.

1.1 This Contract is composed of the following documents:

1.1.1 This Contract

1.1.2 The City’s Solicitation, RFP, SMW0122 Including all documents incorporated by reference

1.1.3 HP Enterprise Services’ Offer, dated October 24, 2014, including subsequent clarifications

1.2 Order of Precedence. Any inconsistency or conflict in the Contract documents shall be resolved by giving precedence in the following order:

1.2.1 This Contract

1.2.2 The City’s Solicitation as referenced in Section 1.1.2, including all documents incorporated by reference

1.2.3 The Contractor’s Offer as referenced in Section 1.1.3, including subsequent clarifications.

1.3 Term of Contract. The Contract will be in effect for an initial term of twelve (12) months and may be extended thereafter for up to one (1) additional twelve (12) month extension option, subject to the approval of the Contractor and the City Purchasing Officer or his designee. See the Term of Contract provision in Section 0400 for additional Contract requirements.

1.4 Compensation. The Contractor shall be paid a total not to exceed amount of \$400,000 for the initial twelve (12) month Contract term and a total not to exceed amount of \$900,000 for the twelve (12) month extension option, for a total contract amount not to exceed \$1,300,000.

1.5 Quantity of Work. There is no guaranteed quantity of work for the period of the Contract and there are no minimum order quantities.

1.6 Clarifications and Additional Agreements. The following are incorporated into the Contract.

1.6.1 Section 0300 Standard Purchase Terms and Conditions

OMIT sections 19.A and 19.C from Contract

19. Warranty-Price:

A. The Contractor warrants the prices quoted in the Offer are no higher than the Contractor’s current prices on orders by others for like Deliverables under similar terms of purchase.

- C. In addition to any other remedy available, the City may deduct from any amounts owed to the Contractor, or otherwise recover, any amounts paid for items in excess of the Contractor's current prices on orders by others for like Deliverables under similar terms of purchase.

1.6.2 Section 0300 Standard Purchase Terms and Conditions

Replace section 31.B with the following language:

31. Indemnity:

- B. THE CONTRACTOR SHALL DEFEND (AT THE OPTION OF THE CITY), INDEMNIFY, AND HOLD THE CITY, ITS SUCCESSORS, ASSIGNS, OFFICERS, EMPLOYEES AND ELECTED OFFICIALS HARMLESS FROM AND AGAINST ALL THIRD PARTY CLAIMS ARISING OUT OF, INCIDENT TO, CONCERNING OR RESULTING FROM THE FAULT OF THE CONTRACTOR, OR THE CONTRACTORS AGENTS, EMPLOYEES OR SUBCONTRACTORS, IN THE PERFORMANCE OF THE CONTRACTORS OBLIGATIONS UNDER THE CONTRACT. NOTHING HEREIN SHALL BE DEEMED TO LIMIT THE RIGHTS OF THE CITY OR THE CONTRACTOR (INCLUDING BUT NOT LIMITED TO, THE RIGHT TO SEE CONTRIBUTION) AGAINST ANY THIRD PARTY WHO MAY BE LIABLE FOR A THIRD PARTY CLAIM

1.6.3 Section 0400 Supplemental Purchase Provisions

In Section 3, Insurance, HP does not require their Insurer's to notify HP clients of insurance cancellations, but HP will endeavor to advise the client of any policy cancellation within a reasonable time.

Replace section 3.A.ii, 3.B, 3.B.ii, 3.B.iv, and 3.C with the following language:

3. Insurance:

A. General Requirements:

- ii. The Contractor shall not commence work until the required insurance is provided and until such insurance has been reviewed by the City. Approval of insurance by the City shall not relieve or decrease the liability of the Contractor hereunder and shall not be construed to be a limitation of liability on the part of the Contractor.

- B. Specific Coverage Requirements: The Contractor shall carry insurance in the types and amounts indicated below for the duration of the Contract, including extension options and hold over periods, and during any warranty period. These insurance coverages are required and are not intended to limit the responsibility or liability of the Contractor.

- ii. Commercial General Liability Insurance: The bodily injury and property damage per occurrence are \$500,000 for coverages A (Bodily Injury and Property Damage) and B (Personal and Advertising Injury).
- iii. Business Automobile Liability Insurance: The Contractor shall provide coverage for allowed, non-owned and hired vehicles with a combined single limit of \$500,000 per occurrence for bodily injury and property damage. Alternate acceptable limits are \$250,000 bodily injury per person, \$500,000 bodily injury per occurrence and at least \$100,000 property damage liability per accident.
- iv. Professional Liability Insurance: The Contractor shall provide coverage, at a limit of \$1,000,000 per claim, to pay on behalf of the assured all sums which the assured shall become legally obligated to pay as damages by reason of any negligent act, error, or omission arising out of the performance of professional services under this Agreement.

If coverage is written on a claims-made basis, the retroactive date shall be prior to or coincident with the date of the Contract and the certificate of insurance shall state that the coverage is claims-made and indicate the retroactive date. This coverage shall be continuous and will be provided for 12 months following the completion of the contract.

C. Endorsements: The specific insurance coverage endorsements specified above, or their equivalents must be provided. In the event that endorsements, which are the equivalent of the required coverage, are proposed to be substituted for the required coverage, copies of the equivalent endorsements must be provided.

- 1.6.4 Intellectual Property Rights: No transfer or ownership of any intellectual property will occur under this Agreement. The City grants Contractor a non-exclusive, worldwide, royalty-free right and license to any intellectual property that is necessary for Contractor and its designees to perform the ordered services. If deliverables are created by Contractor specifically for The City and identified as such, Contractor hereby grants The City a worldwide, non-exclusive, fully paid, royalty-free license to reproduce and use copied of the deliverables internally.
- 1.6.5 Limitation of Liability: Neither party shall in any event be liable for any indirect, special or consequential damages whatsoever, under any theory of relief, including without limitation, breach of warranty, breach of contract, tort (including negligence), strict liability, or otherwise, arising out of or related to that party's acts or omissions. Except to the extent covered by, and subject to the limits established under Insurance, or for claims arising out of gross negligence, willful misconduct or patent infringement, under no circumstances shall either party's liability to the other exceed one (1) times the contract price.
- 1.6.6 Contract Manager: The following person is designated as Contract Manager, and will act as the contact point between the City and the Contractor during the term of the Contract:

Darrell Rochte
CTM Data Center Supervisor
512-974-2103, Darrell.Rochte@austintexas.gov

This Contract (including any Exhibits) constitutes the entire agreement of the parties regarding the subject matter of this Contract and supersedes all prior and contemporaneous agreements and understandings, whether written or oral, relating to such subject matter. This Contract may be altered, amended, or modified only by a written instrument signed by the duly authorized representatives of both parties.

In witness whereof, the parties have caused a duly authorized representative to execute this Contract on the date set forth below.

HP ENTERPRISE SERVICES, LLC

Mike Freese

Printed Name of Authorized Person



Signature

Senior Director

Title:

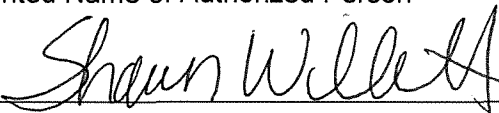
6/8/15

Date:

CITY OF AUSTIN

Shawn Willett

Printed Name of Authorized Person



Signature

Corp. Purchasing Manager

Title:

6/9/15

Date:



CITY OF AUSTIN, TEXAS

Purchasing Office REQUEST FOR PROPOSAL (RFP) OFFER SHEET

SOLICITATION NO: SMW0122

DATE ISSUED: September 1, 2014

REQUISITION NO.: RQM 14082600525

COMMODITY CODE: 91890

**FOR CONTRACTUAL AND TECHNICAL
ISSUES CONTACT THE FOLLOWING
AUTHORIZED CONTACT PERSON:**

Ms. Shawn M. Willett
Corporate Contract Compliance Manager

Phone: (512) 974-2274

E-Mail: Shawn.Willett@austintexas.gov

COMMODITY/SERVICE DESCRIPTION: Data Center
Relocation Consultant

PRE-PROPOSAL CONFERENCE TIME AND DATE: 9:30 AM
on September 17, 2014

LOCATION: One Texas Center, Room #500
505 Barton Springs Road, Austin TX 78704

PROPOSAL DUE PRIOR TO: 3:00 PM on October 10, 2014

PROPOSAL CLOSING TIME AND DATE: 3:00 PM on October
10, 2014

LOCATION: MUNICIPAL BUILDING, 124 W 8th STREET
RM 308, AUSTIN, TEXAS 78701

**When submitting a sealed Offer and/or Compliance Plan, use the proper address for the type of service desired,
as shown below:**

P.O. Address for US Mail	Street Address for Hand Delivery or Courier Service
City of Austin	City of Austin, Municipal Building
Purchasing Office-Response Enclosed	Purchasing Office-Response Enclosed
P.O. Box 1088	124 W 8 th Street, Rm 310
Austin, Texas 78767-8845	Austin, Texas 78701
	Reception Phone: (512) 974-2500

**To ensure prompt delivery, all packages SHALL BE CLEARLY MARKED ON THE OUTSIDE "Purchasing
Office-Response Enclosed" along with the offeror's name & address, solicitation number and due date and
time. See Section 0200 Solicitation Instructions for more details.**

All Offers (including Compliance Plans) that are not submitted in a sealed envelope or container will not be considered.

SUBMIT 1 ORIGINAL, 8 COPIES, AND 1 ELECTRONIC COPY OF YOUR RESPONSE

*****SIGNATURE FOR SUBMITTAL REQUIRED ON PAGE 3 OF THIS DOCUMENT*****

Solicitation No. RFP SMW0122

This solicitation is comprised of the following required sections. Please ensure to carefully read each section including those incorporated by reference. By signing this document, you are agreeing to all the items contained herein and will be bound to all terms.

SECTION NO.	TITLE	PAGES
0100	STANDARD PURCHASE DEFINITIONS	*
0200	STANDARD SOLICITATION INSTRUCTIONS	*
0300	STANDARD PURCHASE TERMS AND CONDITIONS	*
0400	SUPPLEMENTAL PURCHASE PROVISIONS	6
0500	SCOPE OF WORK	10
0600	PROPOSAL PREPARATION INSTRUCTIONS & EVALUATION FACTORS	7
0601	COST PROPOSAL SHEET	4
0605	LOCAL BUSINESS PRESENCE IDENTIFICATION FORM – Complete and return	1
0700	REFERENCE SHEET – Complete and return if required	2
0800	NON-DISCRIMINATION CERTIFICATION	*
0805	NON-SUSPENSION OR DEBARMENT CERTIFICATION	*
0810	NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING CERTIFICATION	*
0815	LIVING WAGES AND BENEFITS CONTRACTOR CERTIFICATION–Complete and return	1
0835	NONRESIDENT BIDDER PROVISIONS – Complete and return	1

* Documents are hereby incorporated into this Solicitation by reference, with the same force and effect as if they were incorporated in full text. The full text versions of these Sections are available, on the Internet at the following online address:

http://www.austintexas.gov/financeonline/vendor_connection/index.cfm#STANDARDBIDDDOCUMENTS

If you do not have access to the Internet, you may obtain a copy of these Sections from the City of Austin Purchasing Office located in the Municipal Building, 124 West 8th Street, Room #308 Austin, Texas 78701; phone (512) 974-2500. Please have the Solicitation number available so that the staff can select the proper documents. These documents can be mailed, expressed mailed, or faxed to you.

I agree to abide by the City's MBE/WBE Procurement Program Ordinance and Rules. In cases where the City has established that there are no M/WBE subcontracting goals for a solicitation, I agree that by submitting this offer my firm is completing all the work for the project and not subcontracting any portion. If any service is needed to perform the contract that my firm does not perform with its own workforce or supplies, I agree to contact the Small and Minority Business Resources Department (SMBR) at (512) 974-7600 to obtain a list of MBE and WBE firms available to perform the service and am including the completed No Goals Utilization Plan with my submittal. This form can be found Under the Standard Bid Document Tab on the Vendor Connection Website:

If I am awarded the contract I agree to continue complying with the City's MBE/WBE Procurement Program Ordinance and Rules including contacting SMBR if any subcontracting is later identified.

The undersigned, by his/her signature, represents that he/she is submitting a binding offer and is authorized to bind the respondent to fully comply with the solicitation document contained herein. The Respondent, by submitting and signing below, acknowledges that he/she has received and read the entire document packet sections defined above including all documents incorporated by reference, and agrees to be bound by the terms therein.

Company Name: HP Enterprise Services, LLC

Company Address: 3000 Hanover St. MS 1064

City, State, Zip: Palo Alto, CA 94304

Federal Tax ID No. [REDACTED]

Printed Name of Officer or Authorized Representative: Michael Freese

Title: ES SLED Senior Director, West District

Signature of Officer or Authorized Representative: 

Date: 10/22/14

Email Address: michael.freese@hp.com

Phone Number: 503-428-1091

*** Proposal response must be submitted with this Offer sheet to be considered for award**



HP Enterprise Services, LLC
13800 EDS Drive
Herndon, VA 20171

Monday, October 20, 2014

City of Austin
Purchasing Office Attention: Shawn M. Willet
Lyndon B. Johnson State Office Building
124 W 8th Street, Rm 310
Austin, Texas 78701

Reference: Solicitation SMW0122 Data Center Relocation Consultant Services (in support of the Data Center Relocation (DCR) Project)

Dear Ms. Willet:

On the subsequent pages, please review HP Enterprise Services, LLC (HPES) response for the Data Center Relocation Consultant RFP, solicitation SMW0122. We are pleased to provide our proposal to the City of Austin for accomplishing this multi-phase project. Our proposal includes our approach, capabilities, and price for phase 1, understanding that the results of phase 1 will be necessary components to providing effort and pricing for phase 2 and beyond.

HPES has deep experience delivering data center relocation consulting that includes all phases of successful project completion. This is showcased in the references section and includes a sampling of our organizational expertise in relocating and consolidating data centers from commercial and public sector organizations. Some of the same people who contributed to those projects comprise the Data Center Relocation Consultant team that we are proposing for this project for the City of Austin. Our team will come alongside Austin's existing staff to advise and manage phase 1's required deliverables and ensure that the City of Austin has the best plan for moving forward on your Data Center Relocation project.

Thank you for providing us the opportunity to propose leveraging our expertise and team to fulfill your relocation needs. We eagerly anticipate being a valued extension of the City of Austin staff and set our expectations to contribute to this project by bringing all our creativity and experiences to bear. HPES is fully committed to the City of Austin, and we stand ready to deliver and exceed your expectations.

Sincerely,

Mike Freese
ES SLED Senior Director West District



Optimum results

Delivering 24x7 cost-effective, reliable, and flexible data center services to meet your needs today and tomorrow



HP Enterprise Services' Response to City of Austin, Texas for Data Center Relocation Consultant Services (in support of the Data Center Relocation (DCR) Project)

Solicitation Number: SMW0122

October 24, 2014

**Technical Proposal
COPY**

Tab 1 - Executive Summary

1. Name of the proposing firm

HP Enterprise Services, LLC.

2. Address of the proposing office

14231 Tandem Boulevard
Austin, Texas 78728

3. Contact names, telephone numbers, fax numbers, and e-mail addresses for individuals authorized to answer technical, price, and/or contract questions

Name: Joshua Hoeft

Title: Client Sales Executive, HP Enterprise Services, State and Local Government and Education

Telephone: 512-522-2416

Fax Number: N/A

E-mail: joshuah@hp.com

4. General summation of proposal including a brief statement highlighting the significant features of the proposal and its component parts. Also include any additional information of a general nature, which will aid the evaluation team's understanding the thrust of the proposal.

City of Austin CTM Vision for Data Center Relocation (DCR) Consultant

The City of Austin's long term mission is to be the best-managed city in the United States, on the road to making it the most livable city in the country. The Communications and Technology Management (CTM) Department is tasked with supporting and implementing technology that helps accomplish that vision, and a tactical and critical component is to adequately maintain the city's compute infrastructure. CTM needs to relocate the primary data center, which is currently housed in an inadequate space, and at some point needs to consolidate with the other disparate data centers throughout the city. By the end of this data center project, CTM will achieve the streamlining of compute resources, reduction in cost associated with those resources, and more efficient utilization of those resources.

Challenges CTM Faces for Data Center Relocation

Based on knowledge gained from other relocation projects, HP Enterprise Services (HPES) expects that CTM will face a range of challenges that include the following:

1. Gaining a thorough and complete inventory of the existing compute infrastructure that includes hardware, applications, and physical layout
2. Understanding the rationalization and dependencies of the applications to minimize any business impact to the relocation
3. Engineering a comprehensive design that encompasses future building space, infrastructure layout and requirements



4. Compiling a relocation master plan that takes all needs into consideration and charts a method to successfully move the data center and test for full functionality once all the equipment is moved
5. Finding creative ways to complete each phase of the project within the limited budget and scarce staff availability

Capabilities Needed to Overcome Challenges

To successfully manage these challenges, CTM will need to contract with a vendor that has demonstrable experience in navigating through these exact challenges or similar ones to them and that has the ability to showcase ways of completing the phases on time and within budget. Specifically, CTM needs a consultant who can demonstrate a successful approach and methodology to this project that is born out of real-world experience and delivery to like-sized clients. At the same time, they should be able to show efficiencies in working through the project plan with a qualified and experienced team that is easy to work with on a day-in and day-out basis and that is always looking to the best interests of CTM and its stakeholders. For example, as ways are discovered to save time or cost, then those should be brought to the attention of CTM, discussed, and implemented as directed.

For this data center relocation project, HPES is that consultant.

HPES: The Right Team

In our work with Eisenhower Medical Center, we developed a data center layout and migration plan and executed a successful relocation. That planning phase included how to move 400 servers running over 280 applications, many of which ran life or death health care business processes. During the analysis phase, we discovered issues with the hospital's SAN infrastructure that needed to be dealt with prior to the move. Since the data center had been built piece-by-piece over a period of many years, we discovered that the SANs were based on multiple switch technologies and were unaware of each other. The differing architectures increased the administrative burden and did not allow for data to move from one SAN to another. HPES designed a more enterprise-aware SAN fabric, along with developing SAN standards and a strategy that would better serve the hospital's future needs. Though this was added scope, the improvements in the SAN fabric ultimately saved cost and time and still allowed us to deliver the relocation within budget and on time.

The story for Eisenhower Medical Center is not unique to them. In 2011, the University of Utah chose HPES to assist them in relocating the university's multiple data centers into one dedicated physical location. As the Project Manager, Carl Greer led our team in gathering a complete inventory of the university's hardware and applications and compiling a comprehensive migration plan. During the inventory phase, the team discovered multiple devices and inventory the university did not know existed, and they found ways of adding efficiencies and reducing cost throughout the process that were implemented throughout the migration. As the Account Executive, Emie Sanders ensured cohesive integration between HPES and the University of Utah and stood ready to handle any escalations, concerns, or contract changes that may have been needed.

Carl will be leading the HPES team for the City of Austin relocation project. Assisting Carl, Jay Preall and Jeff Gum have extensive experience in application inventory and rationalization as either standalone projects or part of data center relocations. In 2006, HP embarked on an ambitious endeavor to consolidate 85 global data centers down to six. EYP was chosen as the engineering partner of choice to help deliver on that endeavor, and by 2010, the project was largely complete. Along the way HP acquired EYP, and as HP engineers, they will complete the



HPES team led by Carl. While our processes are proven and make project planning and execution go smoothly, our team members are proud to be the people to deliver a successful relocation plan and subsequent execution of that plan for CTM.

5. Explanation of suitability of the services

The HPES consulting approach will provide the confidence in the resulting relocation plan, the framework for providing the financial investment business case, and the statement of work to assist with acquiring the right facility to move the data center equipment into. We expect that the Phase 2 requirements will change based on the inventory and business needs analysis and workshops performed in Phase 1. From our past experiences with other clients and conversations with CTM staff prior to this proposal request, we have a pretty good idea of what you are dealing with, and we believe that more cost effective solutions exist for CTM to consider. For this reason, we are submitting pricing and presenting the level of effort to fulfill the requirements of Phase 1, and we expect throughout the duration of the phase to be preparing the appropriate scope and recommendations for Phase 2.

Our approach also includes an active teaming and partnership with CTM staff. Take the inventory process as an example. HPES would provide the framework, tools, time-to-completion and methodologies to follow to collect the inventory items for both the hardware and software in the data center. Instead of paying a high consultant price for HPES to gather the data, the HPES team would have the CTM staff complete the data inventory and deliver the information back to the HPES team for analysis and plan creation. In our proposal, we have identified areas where this could work most effectively for inventory and other processes, saving on budget and allowing focus for other areas of efficiency or improvement along the way.

Why HP?

At HPES we have the deep experience and expertise CTM needs for partnering and walking with you to successful completion of not just Phase 1 but all phases of the City of Austin's Data Center Relocation project. Our data center engineers are the top ranked consultants for site selection, build-out, and design with many years' facility experience accommodating nearly every type of request and need. Our relocation consulting team is led by one of our top project management data center relocation consultants in Carl Greer, and his teams have a track record of finding cost savings and uncovering efficiencies. In past deliveries, HPES has received accolades and commendations not only in our ability to handle the technical nature of relocating data centers but also in managing and integrating with the people element involved. HPES will deliver Phase 1 and be prepared to deliver the rest of the phases, and we will do it in a way that invites camaraderie and partnership.

Our Commitment

HPES stands committed to bring the best team and all our lessons learned experience to bear in consulting for the City of Austin and the CTM team. We have an open door leadership structure that invites communication and collaboration with our clients. We will remain dedicated to make sure the stakeholder needs are met, and that the City of Austin is set on the right future path for all your entire data center and computing needs.



6. Statement of any assumptions made

The RFP indicates that this project duration will last twelve months. However, HPES expects to have Phase 1 completed within eight to nine months on our initial estimations. The time to completion could be shorter depending on what we discover with CTM on the initial set of workshops and data gathering.

In summary, we will follow and work with CTM staff to complete the requirements of our proven methodology for developing a relocation plan and the other Phase 1 requirements for data center space and planning. We have confidence that our approach will also exceed the initial expectations of the RFP both in how we meet the timeline and budget requirements. In order for this process to go as smoothly as possible, HPES has the following assumptions:

1. HPES will train and work with CTM staff to do the data inventory
2. Timeline for inventory completion is two months after training
3. Assuming CTM staff availability, the rate of data for applications will be approximately 35-40 per week



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Tab 3 - Firm Background, Principal Officers and Business Organization

1. Listing of the principal officers of the company, including name, title and tenure.

The principal officers of HP Enterprise Services, with their title and tenure in the position are:

- **Meg Whitman** – President and Chief Executive Officer. 3 years in position
- **Mike Nefkens** – Executive Vice President, HP Enterprise Services. 2 years in position
- **Marilyn Crouther** – Senior Vice President and General Manager, Enterprise Services, US Public Sector (USPS). 3 years in position
- **Brian Kitzmiller** – Interim Vice President, Enterprise Services USPS State, Local and Education (SLED) Segment. 2 months in position

2. Specify the branch office or other subordinate element which will perform or assist in performing the work herein.

14231 Tandem Boulevard
Austin, Texas 78728

3. Include the State which incorporated or licensed to operate

HP Enterprise Services, LLC is incorporated in the State of California. The HPES Federal Tax ID number is 75-2548221.

HP Enterprise Services' Franchise Tax Account Status with the Office of the Comptroller in the State of Texas is as follows¹:

- **Texas Taxpayer Number** - 17525482216
- **Right to Transact Business in Texas** – Active
- **Effective Secretary of State Registration Date** – 9/30/2008
- **Texas Secretary of State File Number** - 0801035117
- **Registered Office Street Address** - 1999 BRYAN ST., STE. 900, DALLAS, TX 75201

¹ Source: <https://mycpa.cpa.state.tx.us/coa/index.html>



4. Project management organizational chart identifying the Project Manager and full time/part time project staff members, including resumes for project personnel and the amount of time each project staff member will be dedicated to the project.

The HPES proposed project organization for Phase 1 delivery to the City of Austin is in Figure 1.

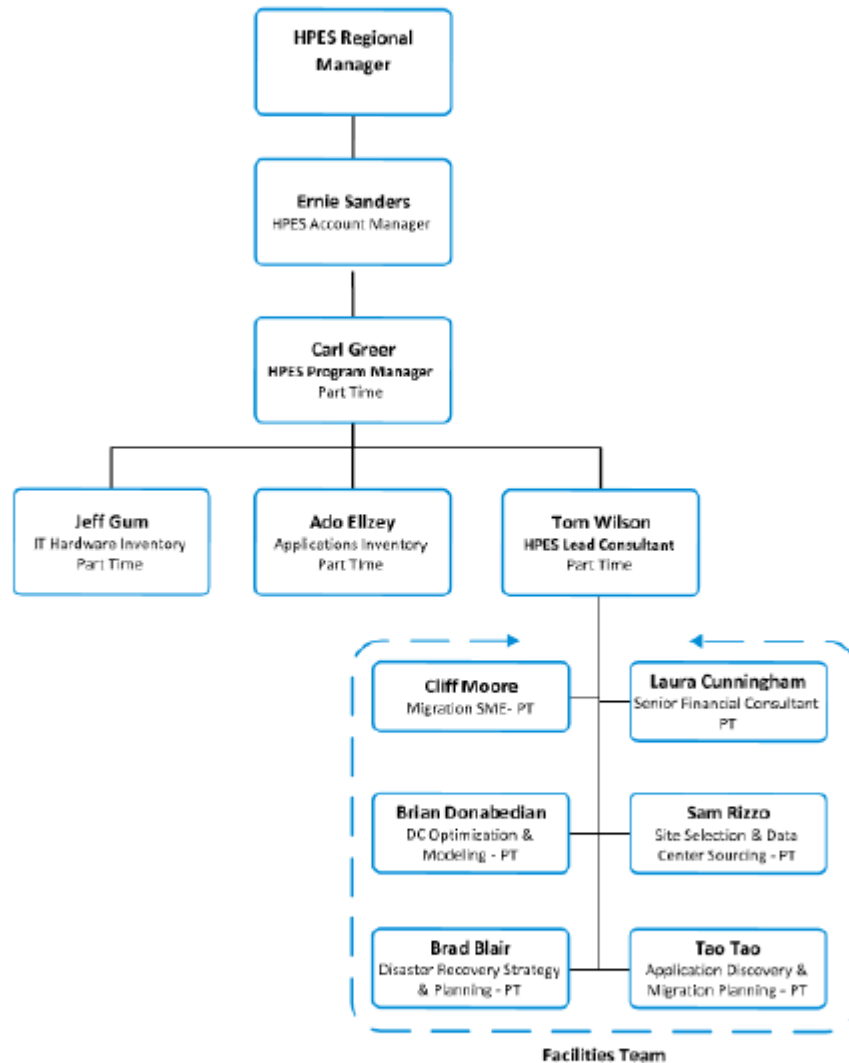


Figure 1 - HPES Phase 1 Project Organization



HPES Team Structure

The HPES team will be led by two resources, Carl Greer, PMP (Program Manager) and Tom Wilson (Lead Consultant). Resumes for these team members are located in Tab 4, Item #5.

- **Carl Greer – Program Manager** - Leads the overall HPES project team and leads the IT Inventory activities. The following resources report directly to Carl:
 - **Tom Wilson, Lead Consultant** - Tom will lead the direction of the Facilities team
 - **Jeff Gum, IT Hardware Inventory** - Primary resource to create current state floor plans, guide CTM team through IT hardware inventory.
 - **Ado Ellzey, Applications Inventory** - Guide CTM team through applications inventory.
- **Tom Wilson, Lead Consultant** - Tom will engage the following part time resources as needed during the project to develop the Phase 1 deliverables.
 - **Cliff Moore, PMP**- Senior Consultant, Program Manager, Migration SME
 - **Laura Cunningham, CPA** - Senior Financial Consultant
 - **Brian Donabedian** - Senior Consultant, DC Optimization/Modeling
 - **Brad Blair** - Consultant, Disaster Recovery Strategy & Planning
 - **Sam Rizzo** - Senior Consultant, Site Selection & Data Center Sourcing
 - **Tao Tao** - Senior Consultant, Application Discovery & Migration Planning

5. State the name, location and date of all contracts that have been terminated or canceled within the past ten (10) years, prior to the expiration of their term. Disclose any judgments, any pending lawsuits, or unresolved disputes related to your operation within the past ten (10) years.

HPES is a subsidiary of Hewlett-Packard Company. HP is a fortune 10 Company with a large amount of contracts in place at any given period of time. These contracts, and any related contractual disputes, are considered confidential Information between HP and the other contracting party. As a result, HP is not allowed to disclose information pertaining to these contractual relationships.

Matters that are material to HP's business or financial results are reported in our 10K and other appropriate public filings. For the complete 10Q report, please refer to Investor Relations at: <http://h30261.www3.hp.com/phoenix.zhtml?c=71087&p=irol-irhome>.

6. The Contractor must disclose existing preferred business relationships with specific solution providers or proprietary information technology products.

HPES is a subsidiary of Hewlett-Packard Company. HP is a Fortune 10 Company with contractual relationships with a wide array of partners and suppliers, supporting a large portfolio of service offerings. HP is not allowed to disclose the contractual information pertaining to these partners and suppliers, but can provide a list of certain partner relationships upon request.



7. Provide length of time firm has been in business. Length of time firm has worked with state/local governments.

HPES is a subsidiary of Hewlett-Packard Company. HPES has the ability to tap into all of the HP Company's resources as required.

Hewlett-Packard (HP) was founded in 1939 by two engineers – Bill Hewlett and Dave Packard – who believed in the power of technology and the contribution it could make to our customers' lives, communities and businesses. Celebrating our 75th anniversary in 2014, we are still a company that applies new thinking to improve the lives and businesses of our customers.

Today HP is one of the largest technology companies in the world, with a global reach and an array of solutions that go well beyond the printers and PCs that we are famous for. At HP we are proud that our products touch so many lives, and we want you to know that this is just the beginning. We believe that technology is vital to helping us all succeed in this rapidly changing world. We believe that because we serve such a wide range of customers we have a unique perspective on their needs and an exceptional level of insight into how they may be solved. And we are committed to using our products, services, and ideas to unleash the exciting new possibilities just around the bend.

In its proud history, HP has not only changed the face of technology but also changed the way that an entire industry has come to view its commitments to its people, its customers, its communities and the world.

HPES supports many industries including the Public Sector where we have helped Government and Education clients meet their IT and business objectives for more than 50 years. We provide applications, infrastructure, cloud, mobility, security and a variety of services and solutions to the Federal Government, Department of Defense, Intelligence Agencies, State & Local Governments and to Educational Institutions.

8. List office locations, Austin, Texas and other.

HPES is a subsidiary of Hewlett-Packard Company. With several hundred sales and service offices in more than 170 countries worldwide, HP's extensive global presence offers customers locally available products and support services.

HPES has a number of offices in Austin and in the state of Texas:

Office Name	City	Address
Austin	Austin	14231 Tandem Boulevard
Dallas Staging Center	Carrollton	2020 McDaniel Drive
El Paso	El Paso	7777 Market Center
Houston Data Center	Houston	15555 Cutten Road
Houston Emissions Control Lab	Houston	10320 Rodgers Road
Houston	Houston	11445 Compaq Center Drive
Plano Data Center	Plano	6901 Windcrest Parkway
Plano	Plano	5400 Legacy Dr.
Travesia	Austin	3800 Quick Hill Road

Table 1 - HP Office Locations in Texas



Tab 4 - Expertise, Experience, Qualifications, and Professionalism

Describe your expertise, experience, qualifications, and professionalism as it applies to this project.

Widely recognized as a leading innovator in its field, EYP Mission Critical Facilities (HP/EYP MCF) strengthens HP's ability to help our customers improve data center computing performance and availability, maximize data center energy efficiency, and achieve cost-effective data center transformation. As a wholly owned subsidiary of HP, HP/EYP MCF is licensed to practice and deliver professional engineering services.

HP/EYP MCF is a focused, independent, consulting group within HP that specializes in Data Center strategy, complex roadmap development, data center sourcing and financial analysis. The group also provides full design, construction, implementation and migration services. This is our only mission and we possess a high level of skills in broad areas needed to properly deal with this topic.

HP/EYP MCF has worked with financial services, telecommunications, information technology, broadcast, and healthcare enterprises around the world, as well as numerous federal, state and local government agencies including higher education institutions.

Delivered by highly experienced professionals, HP/EYP MCF supports a wide range of data center planning, design, and operations requirements. Whether a customer's goal is to create an entirely new facility or optimize an existing one, we can provide the specific service levels needed across every phase a project's lifecycle.

HP/EYP MCF professionals complement HP's extensive data center infrastructure services portfolio and advanced power and cooling solutions with proven expertise in strategic planning, design, and operational continuity support for large-scale mission critical facilities.

1. Demonstrate your knowledge and expertise in planning, design, and relocation of Data Centers and the government Information Technology environments for which work is to be performed.

Experience in Data Center Relocation Planning

HP/EYP MCF is recognized worldwide as a leading engineering and IT consulting firm dedicated to the strategic technology planning, analysis, design, implementation, commissioning and operations of enterprises whose mission or business success is driven by our clients' critical need for operational continuity, energy efficiency, and cost effectiveness. Our projects include data centers, trading floors, command and control centers, R&D facilities, high-performance computing centers, SCIFS, and other technology-intensive environments. Our clients' program requirements involve facilities where minutes or even seconds of downtime can result in not only millions of dollars of lost revenue equally important, life-threatening situations or threats to our national security. Therefore, the projects we design are built to move critical data with an extremely high degree of reliability, security, and maximum efficiency.

Our Critical Facilities Consulting (CFC) division offers comprehensive enterprise critical system strategy and technology planning, needs analysis, programming and ROM cost estimating. Our Critical Facilities Implementation and Design (CFI and CFD) divisions offer innovative design and/ or implementation of both new, technically sophisticated mission critical facilities as well as the renovation and upgrade of existing facilities. Our Critical Facilities Assurance (CFA) division provides commissioning, reliability-centered maintenance and on-site engineering support.



Having designed 800+ MW of power/backup power systems, 200,000+ tons of cooling, and 65,000,000 sq. ft. of raised floor environments; provided 23,000,000 sq. ft. of facility risk/reliability assessments; and commissioned 30,000,000+ sq. ft. of facilities, HP/EYP MCF is nationally recognized as the thought leader in the planning and design of high-performance, high-reliability, and high-security facilities. This recognition is based not only on the consulting assignments we undertake for our diverse Fortune 1000 and public-sector client base, but also on our R&D collaborations with the world's leading computing technology firms, the white papers we author, and the technical seminars we lead on the planning, design and operations of critical facilities.

HP/EYP MCF is a focused, independent, consulting group within HP that specializes in Data Center strategy, complex roadmap development, data center sourcing and financial analysis. The group also provides full design, construction, implementation and migration services. This is our only mission and we possess a high level of skills in broad areas needed to properly deal with this topic. As it relates to this project, some of the services we provide:

- Data Center Strategy Development with vertical knowledge across specific areas such as:
 - Financial, Insurance, Banking
 - Colleges and Universities
 - Federal, State and Local government
 - Health Care, Hospitals, Life Sciences, Pharmaceutical
 - Manufacturing

This knowledge allows for the understanding of each areas complexities and the ability to cross share new ideas that are applicable between verticals

- Data Center Disaster Recovery and Resiliency Analysis
- Use of sophisticated, proprietary, Data Center Modeling tools (space, power, cooling, network, topology, etc.). These tools allow our clients to perform "what if" scenario development to understand impact of changes to data center strategy, IT architecture, geographic topology, disaster recovery, etc.
- Full Engineering capabilities including data center facility analysis skills. Strategies are only valid if they can be implemented and common failures are usually a result of strategies that have serious engineering, technical or implementation phasing flaws.
- Data Center Sourcing Analysis for strategy development through the use of colocation, hosting, cloud services, real estate acquisition, new build, etc.
- IT Architecture Consulting to analyze enterprise, high performance, academic, and administrative computing needs.
- CPA level financial analysis to allow the creation of Total cost of Ownership, Cash flow and other measures to compare differing combinations of data center strategy scenarios.

The group is staffed by senior consultants with a minimum of 10 years' experience in this area, with a group average of nearly 20 years. They are highly skilled in managing the outcomes of these critical projects dealing with staff at all levels, having the necessary consulting, technical and political skills to keep project teams and clients focused and motivated. Projects like these are complex in that they involve many different communities of interest and can set the tone for follow on phases.

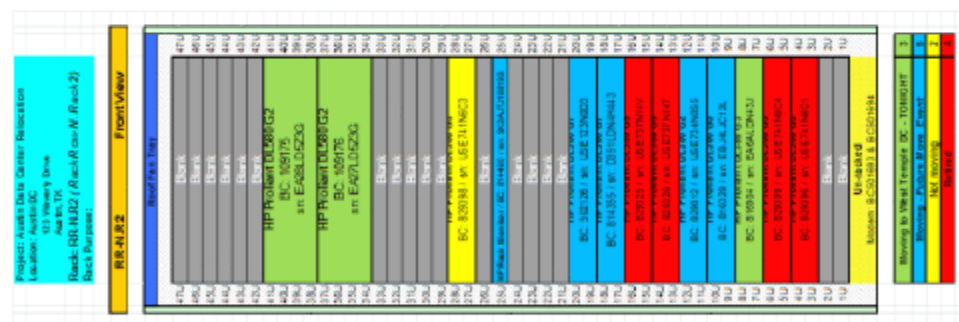


HPES Physical Inventory Process

HPES utilizes a detailed inventory capture and validation process. Capture of all devices and all the necessary details can be a complex task, it requires staff that is focused and understands the complexities of the end state, which in this case is a migration from one facility to another.

Inventory for physical devices starts with Data Center diagramming and a scope definition. With knowledge of the area that is to be inventoried, one can be sure that all items are captured. Creation of floor plans allows for row/rack labeling that is agreed to by everyone allowing for consistent data capture as well as the ability to manage the inventory over time as changes occur prior to migration. A sample floor plan is included in the attachments to this response. Floor plans can be leveraged in migration efforts to show what is necessary to move in a rack providing clear direction to staff. It is also important to have a clear agreement on nomenclature, what is to be inventoried where, and to have customer staff that can be utilized for assistance as necessary.

HPES captures items that cover both inventory and status information to be used during a move/migration and uses data that is provided by various means such as a walk through inventory, meetings, workshops and information supplied by other teams such as the Applications inventory and tiering information. A key method of HPES's inventory process is photographs. These are taken to create a known state and to allow for discussions as needed to validate ownership, data requirements, application information, etc. After data has been captured an as-is rack diagram is typically created for use in the entire process such as migration tasks, power requirements, etc. An example of a rack diagram (Figure 2) and the types of photographs used to document the current state inventory (Figure 3) are shown below.



Sample rack diagram

DESCRIPTION
Represented in the above rack diagram, is a sample "SOURCE" rack.
- Rack: Rack Row and the Rack number are showing where equipment is located in the "SOURCE" rack
- Coloring of cells:
o GREEN - Equipment moving on the scheduled move date (CURRENT)
o BLUE - Equipment existing in the rack in the position shown in the rack (EXISTING)
o YELLOW - Equipment which is NOT MOVING
o RED - Equipment which has been RETIRED and, is staying in the rack

Figure 2 - Example Rack Diagram



Sample Rack front view



Sample Rack rear view



Figure 3 - Photographs Documenting Rack Layout



A sampling of Inventory information is supplied in Table 2 and is customized for each engagement as customer needs require:

Sample Inventory Data		
Unique ID – allows for change management when items move within racks, etc.	MAX Weight(LB)	CL(Cluster Member)
Data Center	Dimensions HxWxD (INCHES)	IP Address
Data Center Street Address	Vendor Warranty/Maintenance Information	MAC Address
Rack – utilizes agreed upon location code	Equipment Replacement Cost	Managed by Team
Rack Position	Device Name=physical device name	Status
U-Size	Host Name=device logical name as necessary	Move information: EVENT, MOVE GROUP, SUB GROUP, Comments
Count Down from "Rack Position"	"CI Asset Type"= type used for CMDB	Asset Type= used to track device type generically
Slot # = i.e. for blades or other devices where necessary	Bar Code = common labeling mechanism	Serial Number
DDC Row	Model/Type	Manufacturer
Owner contact information: Name, E-mail, Phone, Contact Info	DDC Rack	Operating System (OS)
Application information: (as example) Cerner, EPIC, PeopleSoft, VMware, Citrix	DDC Rack Position	Support information: Company E-mail, Phone
User information: (as example) Students, Faculty, Staff, Clinicians, Researchers, Other	S(secure), U(Unsecure), M(Miscellaneous)=i.e. move information as in this example whether the system needs to be handled differently because of security	V – Virtual,P1 - Type 1 (No SAN),P2 - Type 2 (SAN),NA - Not applicable =used for Blades as an example

Table 2 - Sample IT Inventory Data Captured by HPES

HPES Applications Inventory Process

HPES will use our Applications Inventory and Migration framework for this project. During the application inventory process, HPES will provide consultative guidance to the City of Austin for building an 'application move roadmap' and supporting deliverables that target the moving of applications safely and with minimal disruption. HPES has found that the success and benefit of an inventory and relocation planning project is relative to the client-HPES quality time invested together during the engagement.

HPES will provide consultative guidance for documenting the City of Austin's current applications inventory and related systems infrastructure across a number of views. From a process perspective, the current and future state will be determined specific to how the technologies group together to form movable tiers. From a data perspective, documentation will be built based on the automated and manual integration with other applications including usage characteristics. The final move strategy may consider frequency, volumes and average/peak



trends as well as and incoming and outgoing interface flows to make recommendations. The following diagram highlights the HPES standard approach to guiding City of Austin staff in the collection of information needed to build the application move roadmap.



Figure 4 - HPES Application Move Roadmap Process

2. Provide multiple references for equivalent projects where you have successfully guided other clients through similar efforts.

Additional references are located in the response to Tab 5, Item #3.

- **Ohio State University** (*work performed by HP EYP Mission Critical Facilities, Inc., a wholly-owned subsidiary of HP*) - OSU engaged HP/EYP MCF in two major projects (2010 and 2013), along with intervening supportive advisements, regarding their large enterprise IT operations and various data centers. In summary, these engagements initialized and then matured strategies to form actionable pathways and projects.

Using HP's "Programmatic Approach" for IT and data center transformation, HP was asked to develop a comprehensive strategic plan to be used in guiding the University's enterprise data center facility implementation process.

HP/EYP MCF:

- Analyze the 4 data centers' (25,300 sq. ft.) current state enterprise environment; identify future University data center strategic requirements; determine data center operational availability/reliability and disaster recovery requirements; and develop the strategy to support mission critical applications.
- Develop a 10-year enterprise data center Space/Power/Cooling growth profile based on current and/or planned technology inventories to understand overall data center space/power/cooling footprint requirements.



- o Execute a suitability and gap analysis of their data centers to determine the feasibility of consolidating and/or transforming the enterprise, including "What-If" scenarios.
- o Utilize/provide HP best practices, strategies, and recommendations for moving forward with the future state data center framework, including high-level conceptual designs, ROM cost projections and facilities sourcing options.

The Ohio State University (OSU), is a research university in Columbus, OH. Founded in 1870, it has become the 3rd largest university campus in the US. OSU is home to 57,466 students (2013). OSU operates the 18th largest university research library in the US with a combined collection of over 5.8 million volumes. U.S. News currently places OSU as the 16th best public university, 52nd overall in the US. OSU's research expenditures for 2007 were \$720 million, placing it 7th among public universities and 11th overall. OSU's faculty currently includes a Nobel Prize-winning physicist, 21 members of the National Academy of Sciences or National Academy of Engineering, 4 members of the Institute of Medicine, and 177 elected fellows of the American Association for the Advancement of Science.

- **Penn State University** (*work performed by HP EYP Mission Critical Facilities, Inc., a wholly-owned subsidiary of HP*) - Conceptual Master Plan at University Park, PA campus

Among the 10 largest public universities in the U.S., Penn State has 85,000+ students, 8,000 faculties, and 30,000 staffs. HP/EYP MCF CFS was selected to develop future state IT growth model and reliability/availability requirements by holding stakeholder/user group meetings based on Penn State organization units (i.e., Research, Administrative, Academic Units (Colleges), Hospital Units, and executive steering committee. We developed conceptual model(s) for future facility and IT topology. The recommended future state conceptual facility models included HP/EYP MCF CFS Thought Leadership in the following specific areas: Flexible facility modular approach for long term (5-10 year) planning horizon; Benchmarking of Penn State compared to other peer universities; Address deficiencies discovered during the single point of failure analysis of the major data center sites.

HP/EYP MCF CFS provided guidance on the separation of administrative computing requirements vs. research based computing requirements. HP/EYP MCF found that growth modeling and future state requirements usually are significantly different between the comparatively more static administrative type environments compared to the much more dynamic research environment.

Additionally, HP/EYP MCF CFS provided:

- o Gap analysis that provide a summary of existing conditions of critical data centers compared to recommend future state conceptual facility models.
- o Develop Rough Order of Magnitude probable construction cost estimates for each future state facility / IT conceptual model developed.
- o High level risk assessment based on impact to the University for each Conceptual Model developed.
- o Provide a Conceptual Master Plan that includes conceptual model recommendations for both technology systems and associated key data center facilities.



- **American International Group, Inc. (AIG)** (*work performed by HP EYP Mission Critical Facilities, Inc., a wholly-owned subsidiary of HP*) - American International Group, Inc. (AIG) is a leading international insurance organization serving customers in more than 130 countries. AIG companies serve commercial, institutional, and individual customers through one of the most extensive worldwide property-casualty networks of any insurer. In addition, AIG companies are leading providers of life insurance and retirement services in the United States.

Using HP's approach for IT and data center transformation, HP/EYP MCF was asked to develop a strategy and business case to support their global data center consolidation and transformation initiative.

HP/EYP MCF:

- Developed data center standards documents which were compliant with ANSI Standards
- Executed a suitability and gap analysis of their two primary U.S.-centric data centers to determine the feasibility of consolidating 136 data centers/rooms into the two environments
- Planned the transformation of ~11K disparate physical devices on >100K sq. ft. of raised floor to 35K square feet of ruthlessly standardized IT equipment whose server landscape's virtualization ratio improved from 8:1 to 40:1
- Determined high-level power and cooling designs for two new 10,000 sq. ft. Tier 3 NGDC cells that were cut out of the existing primary data centers, including infrastructure remediation, thus saving new construction;

The project, not including application transformation, had a projected savings of \$1.486B over five years.

- **US Marine Corps** (*work performed by HP Enterprise Services*) – Application and Infrastructure Rationalization.

The Situation:

- Our Marines needed to migrate out of an existing sub-optimal base data center
- HP presented the business case of rationalizing the applications and infrastructure portfolio by performing a detailed application impact assessment in conjunction with the data center migration

HP Approach and Solution

- Executed awareness sessions with client leadership
- As a result, developed and executed an Infrastructure Modernization Assessment including a Detailed Application Impact Assessment for the base to support a Data Center migration.
- Approach focused on adding tactical benefits while positioning for strategic rationalization.

Services and Technology Featured

- Infrastructure Modernization Assessment with a Detailed Application Impact Assessment



Client and HP Outcome

- o Assessed over 80 applications, and 150 servers
- o Delivered additional tactical savings as part of the data center migration – reduced servers by more than 10% and applications by more than 25%
- o Recommended changes of application portfolio based on existing organizational enterprise licensing potentially resulting in additional savings in licenses and maintenance costs
- o Implemented the application and infrastructure plan in the new HP data center

3. Describe strategies you will include which are intended to save the City time, trouble, and money. Focus on areas that are important to City such as the City's goal to implement a Data Center with very low impact on the environment that requires awareness of green issues and the technologies and strategies that will help City realize this goal.

The City of Austin has asked the Consultant to provide services for the Data Center and while doing so to utilize strategies to save the City time, trouble and money. While Inventory is only a part of the overall HPES strategy, we have evaluated the process and decided on an initial strategy where we can maximize the value for this process.

The strategy will be to 'guide' the City of Austin in capturing the inventory information using process and methods from HPES. Providing initial training followed up with specific forms and methods will save the City money, allow them to build expertise and start to change the overall business process where the City can continue to manage the change to the inventory over the time required to complete the Data Center move.

4. Provide the names and qualifications of all professional personnel who will be assigned to this project. State the primary work assigned to each person and the percentage of time each person will devote to this work. Identify key persons by name and title.

HPES Team Structure

The HPES team will be led by two resources, Carl Greer, PMP (Program Manager) and Tom Wilson (Lead Consultant). Resumes for these team members are located in Tab 4, Item #5.

Carl Greer – Program Manager (Key Resource)

- **Qualifications** - Carl offers more than 30 years of diverse project management and technical experience, including successfully planning and delivering projects in the areas of technical business solutions, hardware, software, systems, and network design. Experienced in planning and implementation for a multi-location Data Center migration project.
- **Primary Work Assigned** - Leads the overall HPES project team and leads the IT Inventory team.
- **Percent of Time Assigned to Project** – Part Time



Tom Wilson, Lead Consultant (Key Resource)

- **Qualifications** - Over 30 years of experience in the Federal, Department of Defense and Commercial Computing Industries. Tom is an open IT systems architect and systems engineer providing networked systems architecture and design, installation, integration and technical leadership for his customer base.
- **Primary Work Assigned** - Leads the facilities team.
- **Percent of Time Assigned to Project** – Part Time

Jeff Gum

- **Qualifications** - He has 24 years of IT systems experience, and 14 years of experience as a technical lead for IT datacenter projects. He is skilled on a wide array of datacenter infrastructure, including servers, storage systems, networks, operating systems, cabling, and facilities infrastructure.
- **Primary Work Assigned** - create current state floor plans, guide CTM team through IT hardware inventory.
- **Percent of Time Assigned to Project** – Part Time

Ado Ellzey

- **Qualifications** - Provided client with Best Practices to migrate applications and servers to HP Managed Data Centers. Provided application portfolio assessment and analysis via client interviews with application owners, SMEs and architect. Collaborated with Migration Services team to analyze application and server environment.
- **Primary Work Assigned** - Guide CTM team through applications inventory.
- **Percent of Time Assigned to Project** – Part Time

Cliff Moore

- **Qualifications** - Senior Consultant, PMP Certified Program Manager. More than 30 years of experience as a practice leader and program/project management professional. Mr. Moore has managed more than 400+ projects and programs and specializes in Data Center Design/Build/Migration, Data Center Strategy, and IT Governance in the financial, energy, education, local, state, and federal government (US and international) markets.
- **Primary Work Assigned** - Migration SME
- **Percent of Time Assigned to Project** – Part Time

Laura Cunningham, CPA

- **Qualifications** – Certified Public Accountant. Experience in developing technology-based business cases for enterprise-level clients emphasizing Total Cost of Ownership (TCO) and Return on Investment (ROI)
- **Primary Work Assigned** - Senior Financial Consultant; business case
- **Percent of Time Assigned to Project** – Part Time



Brian Donabedian

- **Qualifications** – Senior Consultant, expertise with the physical infrastructure layer of data centers to help clients develop data center strategies that align their physical infrastructure needs to their hardware requirements.
- **Primary Work Assigned** - . DC Optimization/Modeling. Long-range planning for space, power, and cooling based on IT growth trends, emerging technologies, and the optimization initiatives.
- **Percent of Time Assigned to Project** – Part Time

Brad Blair

- **Qualifications** – Specializes in data center strategy, design, and project management, with in-depth expertise of Disaster Recovery and Business Continuity. Mr. Blair has a proven ability to lead and motivate project teams to ensure success and a track record of diagnosing complex problems and delivering effective solutions.
- **Primary Work Assigned** - . Disaster Recovery Strategy & Planning
- **Percent of Time Assigned to Project** – Part Time

Sam Rizzo

- **Qualifications** – over 25 years of experience including opening 37 data centers from analysis through commissioning and operation. Additionally, he has authored respected articles/white papers on facility design, management and operations.
- **Primary Work Assigned** - . Site Selection & Data Center Sourcing
- **Percent of Time Assigned to Project** – Part Time

Tao Tao

- **Qualifications** – over 15 years of IT management and infrastructure optimization/transformation experience; a seasoned IT solution architect and project manager in tier 1 consulting firms with solid experience in both sales and delivery of enterprise-scale IT projects. Tao has led many enterprise data center transformation programs that including data center strategy, next generation data center facility, infrastructure (server, storage, and network) transformation, IT governance and program management.
- **Primary Work Assigned** - . Application Migration Planning
- **Percent of Time Assigned to Project** – Part Time



The HPES project team will need to collaborate with several CTM resources during Phase 1. Project performance is predicated on CTM's staff. Delays in providing this staffing may lead to a Change Order, and result in additional cost and/or delay in completion of the services. The following table outlines the expected participation from CTM's staff. The resources, type of support needed and estimated commitment from CTM resources is outlined in the table below.

Resource Title	Description	Minimum Availability to Project
Project Manager/Lead	Works with the HPES Project Lead to review status, resolve issues, and confirm that Program team commitments are being met. Acts as final decision-maker for issue resolution.	50%
Application Subject Matter Experts	Technical personnel familiar with all applications and their related interfaces to collect and provide application inventory data under the consultative guidance of the HPES Application Discovery and Migration Planning consultant. Will also participate in discussions about assigning applications to tiers.	50%
Physical System Subject Matter Experts	Technical personnel familiar with all physical items in the data center and their related interfaces to provide inventory data and answer technical questions under the consultative guidance of the HPES consultants. Will also participate in discussions about replacement environments	50%

Table 3 - Requested CTM Phase 1 Staff Participation



5. Provide the resumes for all personnel who will be assigned to the project. Emphasize your areas of expertise (such as Data Center design and architecture). The City is interested in your core competencies and range of expertise and history through references, methodology, and number of competencies the team offers. Indicate how your specific levels of expertise and competencies overlap with the City's focus areas.

Carl Greer

Program Manager

Experience Summary

Carl Greer has extensive experience in project management, product development, and consulting from his time as a Project Manager with the Department of Defense – U.S. Navy and as a Program Manager with HP Enterprise Services (HPES) since 1979. Currently, he develops and delivers solutions for HPES Public Sector environments. Carl offers more than 30 years of diverse project management and technical experience, including successfully planning and delivering projects in the areas of technical business solutions, hardware, software, systems, and network design. He has managed a wide variety of programs across a range of customers and territories and has managed the full breadth of the program cycle—everything from the proposal process through implementation of the deliverables. His experience includes managing teams of managers, architects, and technicians; planning large, complex client server implementations; and planning and delivering hardware and software solutions.

Carl also has experience with a variety of HP, Compaq, and Digital hardware environments, as well with projects that involved hardware from IBM, EMC, and SUN/Oracle and that involved various other vendors, such as SGI, WANG, and Data General. Carl's skills include program and project management, global experience, strong technical understanding, and a record of success in a variety of business areas. He has experience with a range of project types, including virtual and physical data center migrations, business applications implementations, and infrastructure migrations and implementations.

Relevant Project Experience

HP Enterprise Services

Jan. 1979 - Present

The following are examples of the many projects Carl has worked on while at HP.

Project Management

University Information and Hospital Organization

Planning and Implementation for a multi-location Data Center migration project. The University runs a large Hospital complex and provides for the business of the University in general. The original plan was a simple move process and turned into a complex migration covering systems from various vendors such as IBM and SUN/Oracle. It involved complex timing and methods to deal with hundreds of virtual systems, the Hospital environment and business requirements for the University. Ability to work with the customer staff and HP flexibility as needs changed was a key plus for this engagement.



City of Austin • Data Center Relocation Consultant Services
(in support of the Data Center Relocation (DCR) Project). RFP SMW0122 / / / 28

Project Management

Multinational vendor of Security, Fire, Healthcare, and Electronics

Data Center implementation for DR site. Worked with IBM, EMC, StorageTek and other major vendors to as part of a team to implement the new Disaster Site in a co-lo facility. Ability to work with many vendors for the hardware implementation and the co-lo and customer staff as infrastructure implementation issues were discovered was a key plus for this engagement.

Project Management

Worldwide Computer Software Manufacturer

Infrastructure team project management and point of contact for business transition environment in outsourced customer infrastructure support organization. Customer has very secure brand name and implementation of web environment transitioning from startup to steady state requires heavy security and extremely fast response times. Ability to work with the customer staff and HP outsourcing as infrastructure needs changed was a key plus for this engagement.

Program Manager

Worldwide Consumer Manufacturing Company

Carl managed the team for design and implementation of Datacenter migration to virtual environment. The customer had outsourced the new Datacenter and required a WAN based migration to the new environment where old systems were replaced with Virtual systems. The environment required for implementation had to have no unscheduled impact on users.

Americas Consulting VMware Driver

In this capacity, Carl worked with the sales and management teams to present to customers at all levels the methodology and benefits of Virtualization. His responsibilities included qualification of potential opportunities and working with customers to identify potential virtualization projects within their environment. In addition, Carl created cost estimates and statements of work, where required, and coordinated delivery resources with geography management teams, including management of those resources.

He also works with third-party software providers to integrate a solution into the portfolio.

Program Manager

Various Customers

As program manager for various customers, Carl was responsible for virtualization implementation and design projects, including migrations to virtual machines.

Program Manager

Customer: Worldwide Computer Software Manufacturer

Carl managed worldwide projects to redesign and implement a global email system using Exchange. The project required custom tools and migration with little or no impact to the current email system.



Program Manager

Worldwide Computer Software Manufacturer

Carl managed the team for worldwide design and rollout of a new Active Directory environment. He worked closely with Microsoft as part of the design phase of the project. Requirements for implementation required extreme testing, and implementation had to have no impact on users.

Program Manager

Worldwide Pharmaceutical Company

In this position, Carl served as project manager for a diverse and global project team. The project encompassed development teams in several countries and time zones. This highly complex project replaced automated desktop deployment processes, and testing was crucial.

This was follow-on to the highly successful project for server deployment done with the same customer.

Program Manager

Computer Manufacturer

Carl developed the Project Plan and Logistics Plan for worldwide rollout of Network Computers for a large computer company. He managed this process with multiple third-party involvement in software, hardware, and training components.

Program Manager

Worldwide Pharmaceutical Company

This project encompassed development teams in several countries and time zones. The highly complex project replaced automated server deployment processes, and testing was crucial.

Sr. Project Manager

Large Metropolitan City Transportation Agency

Carl was project manager for a several projects including Clustering for large non-Microsoft systems, SAP conversion, UNIX integration, Citrix projects, and infrastructure projects. This work required several third parties.

Sr. Project Manager

Large Metropolitan City Government Agency

Carl managed a project for a large metropolitan city government Emergency Operations Center. The project involved multiple third parties, Y2K issues, and political issues.

Project Manager

Major Airline

Carl was the management team member for the development of an EDI solution for a large airline company interfacing with Digital and IBM Computers. Responsibilities included management of the support team for 24X7 support and Database and Network development teams.

Education and Training

Coursework for Engineering degree at San Francisco State University, 1979



Training:

- Carl has kept current with Program Management and appropriate computer technologies by attending several courses and conferences, studying independently, and passing certification exams.
- Carl is VMware Certified for VMware V2 and V3.

Certifications and Expertise*Certifications*

Current Certification	Year Attained
PMI - Project Management Professional (PMP)	2002
VMware Certified Professional (VCP), V2 and V3	2004
ITIL Foundations	2013

Expertise

Expertise					
Strengths: <ul style="list-style-type: none"> • Project Management • International Experience 					
Skills: <ul style="list-style-type: none"> • Program Management • Technical Understanding • Global Experience • Successful in many different business areas 					
Project Types: <ul style="list-style-type: none"> • Datacenter Migration <ul style="list-style-type: none"> ○ Virtual ○ Physical • Business Applications implementation • Infrastructure Migration and implementation • Storage SAN and NAS deployments 					
Technology Implementations Managed: <table> <tr> <td> Platforms: <ul style="list-style-type: none"> • Microsoft Windows – Various • Linux – Red Hat, HP-UX, Sun Solaris </td><td> Database: <ul style="list-style-type: none"> • Microsoft SQL Server • Oracle 8i/9i, 10g, RAC </td></tr> <tr> <td> Hardware: <ul style="list-style-type: none"> • HP, Dell, IBM, Compaq, Digital, Sun </td><td> <ul style="list-style-type: none"> • Sybase • SAP </td></tr> </table>		Platforms: <ul style="list-style-type: none"> • Microsoft Windows – Various • Linux – Red Hat, HP-UX, Sun Solaris 	Database: <ul style="list-style-type: none"> • Microsoft SQL Server • Oracle 8i/9i, 10g, RAC 	Hardware: <ul style="list-style-type: none"> • HP, Dell, IBM, Compaq, Digital, Sun 	<ul style="list-style-type: none"> • Sybase • SAP
Platforms: <ul style="list-style-type: none"> • Microsoft Windows – Various • Linux – Red Hat, HP-UX, Sun Solaris 	Database: <ul style="list-style-type: none"> • Microsoft SQL Server • Oracle 8i/9i, 10g, RAC 				
Hardware: <ul style="list-style-type: none"> • HP, Dell, IBM, Compaq, Digital, Sun 	<ul style="list-style-type: none"> • Sybase • SAP 				



Carroll "Tom" Wilson**Senior Technology Consultant****Experience Summary**

Tom is a Sr. Data Center Consultant and IT Systems Architect for HP's Critical Facilities Services. He has over 30 years of experience in the Federal, Department of Defense and Commercial Computing Industries. Tom is an open IT systems architect and systems engineer providing networked systems architecture and design, installation, integration and technical leadership for his customer base. His current focus is in the Strategic Planning, Architectural Design and Systems Engineering of Data Centers and the transformation and consolidation of complex IT systems that provides sound technical and business solutions to large complex computing environments.

Relevant Project Experience – HP Critical Facilities**Hampton Roads Sanitation District (HRSD)**

Acted as Data Center Trusted Advisor and Lead Data Center Consultant to the Director of Information Services. Effort entailed comprehensive Mechanical, Electrical, Plumbing, Fire Protection and Network Technology Infrastructure peer reviews and design recommendations for their primary data center. The multi-year effort also included reviews and advice of HRSD's data center strategic plan and growth projections. As part of the Trusted Advisor role a comprehensive data center network technology infrastructure design was provided to ensure HRSD could effectively support and grow its IT systems for the life cycle of their new data center.

National Institutes of Health (NIH)

Acted as the Lead Data Center Consultant and Trusted Advisor to the office of the CIO. The effort required a comprehensive peer review of NIH's IT data center strategy to ensure that an effective and innovative basis of design was provided during the design phase of the project. Effort also entailed comprehensive Mechanical, Electrical, Plumbing, Fire Protection and Network Technology Infrastructure peer reviews and design recommendations during the design phase. All data center peer reviews and recommendations were focused on and always geared towards NIH's IT systems operational, growth, financial and uptime requirements.

US Navy

Acted as Lead Data Center Consultant for critical facilities network reliability, redundancy & outage assessment for US Navy at one of their mission critical data centers. This engagement consists of professional data center review of current state of network facilities and IT infrastructure, including service limitations and gaps, and internal and external risks to operations. Analyzed the condition, capacity, and capability of the infrastructure at each site and provide the Government a comprehensive end to end view of network reliability and redundancy to minimize the possibility of single point failure due to natural or human event.

Board of Governors of the Federal Reserve (FRB)

Acted as Lead Data Center Consultant and Trusted Advisor in the development of a Data Center Roadmap and business case for the FRB. The effort entailed the development of future state data center space, power, and cooling projections using planning criteria jointly developed by the project team. During the course of the project high-level assessments and reviews were conducted of the current data center facilities, technology architecture and infrastructures, and



requirements for uptime to identify any gaps or single points of failure was provided and to develop "right sized" 10-year future state data center options and recommendations. Both current state and future state financial analysis that include TCO, ROI AND NPV were created for each data center scenario in order to accurately create a business case for the final Data Center Strategy to be used by the FRB.

United States Joint Forces Command (USJFCOM)

Provided strategic planning, architectural and engineering design requirements to USJFCOM's Office of the CIO and Facilities Engineering Office for JFCOM's Mission Critical Joint Deployment Center. Effort entailed IT systems design for Data Server Spaces, Telecommunications rooms, User Areas, Conference Center, Operations Center and secured IT computing areas. Design included fiber optic and copper network structured cabling, infrastructure, cabinet layouts, UPS sizing, HVAC sizing and Electrical layouts in order to support high density blade workstations and servers. Design included Security Certification and Accreditation planning and for all facilities and related systems.

US Navy (SPAWAR)

Provided IT Systems Technology and Data Center strategic planning to the Joint War Fighting Center's Chief Systems Engineer. The technology and strategic planning effort entailed the creation of a 10 year IT systems and IT centric Facilities Technology plan. This plan detailed the technical strategies that allowed for the development of and insertion of current and useful technologies into the JWFC and its supporting technology facilities. Provided architectural and engineering design requirements for Data Server rooms which included network structured cabling, infrastructure, cabinet layouts, UPS sizing, HVAC sizing and Electrical layouts in order to support high density blade servers. Provided a Peer Review for all Data Center Initiatives where the conceptual plans were reviewed and validated from current and future state technology strategies, growth modeling and capacity planning, data center options and financial analysis.

United States Standing Joint Forces Headquarters (USSJFHQ)

Provided comprehensive data center strategic planning and IT systems assessment to the Office of the Chief Systems Engineer. Provided the architectural and infrastructure engineering design for all server and data communications rooms, Lab Spaces, Operations Centers and user areas for the SJFHQ Prototype Facility. Provided architectural and engineering design requirements for Data Server spaces which included network structured cabling, infrastructure, cabinet layouts, UPS sizing, HVAC sizing and Electrical layouts for the Distributed Joint Command and Control System. Provided design of structured cabling in support of converged IT, Audio/Video, VOIP Telecommunications and environments. Created IT infrastructure retrofit strategies, cost estimates, move planning and INFOSEC certifications and accreditation planning (DIACAP and FISMA) in support of command move.

US Navy's Mid Atlantic Construction Office (MCLO)

Provided comprehensive data center systems strategic planning and IT systems assessment in support of the US Navy's Portsmouth Naval Hospital. Effort entailed comprehensive IT systems analysis in order to provide detailed Space, Power and Cooling requirements; Detailed design and engineering for Data Center, Server and Communications spaces; IT systems.



Newport News Shipbuilding

Provided Data Center Strategic and Master Planning for Creation of strategies for Data Center redesign and server consolidation. Conducted user group interviews, site evaluations, and needs analysis, in depth technology and facilities assessments, gap analysis and programming for the Office of the CIO.

Education and Training

Governmental Administration, Christopher Newport University

Certifications and Expertise*Certifications*

Current Certifications	
Cisco CCNA	Security+
Cisco CCNP	A+ certification
Microsoft MCSE	DoD Architecture Framework (DoDAF)
Sun SCSA	ITIL/ IT Service Management (ITSM)
Red Hat RHCSA	Digital Networks University
Coming Fiber Optic Design and Installation for Data Centers	

Expertise

Expertise
Enterprise IT Systems Architecture and Systems Engineering
Data Center Strategic Planning, Consolidation and Design
Program and Project Management of Large and Complex IT Systems and Data Center Consolidation initiatives
Federal and Department of Defense IT systems architecture, design and engineering
IT Systems Information Assurance requirements, Planning and implementation



Cliff Moore **Critical Facilities Consulting Global PMO Lead**
HP Master Program Manager
Senior Consultant – Migration Strategy and Governance

Experience Summary

Mr. Moore has more than 30 years of experience as a practice leader and program/project management professional. He also served as Chief Technology Officer (CTO) for three energy utility companies and as CEO of two IT consulting firms in the Western US.

Mr. Moore has managed more than 400+ projects and programs and specializes in Data Center Design/Build/Migration, Data Center Strategy, and IT Governance in the financial, energy, education, local, state, and federal government (US and international) markets.

He has served as a senior/executive consultant and Trusted Advisor to local, state and federal government, energy companies, foreign governments, and major banks all over the world.

Relevant Project Experience - HP Critical Facilities Services

Origin Energy

Project Manager for Data Center Roadmap Project

Provided project management for Origin Energy, Sydney, NSW, Melbourne, Vic, and Adelaide, SA, Australia and Wellington, New Zealand's executive strategy, Conceptual Master Planning project regarding data centers for one of the largest natural gas and electric utility companies in the Australia/New Zealand and South Pacific islands region.

Itaú Unibanco

Project Manager for Data Center Roadmap Project

Provided project management for Itaú Unibanco Brazil's executive strategy and data center Roadmap (Conceptual Master Planning) project regarding data centers for the 9th largest bank in the world and the largest in Brazil.

Hawai'i Pacific Health

Lead Data Center Trusted Advisor/Program Manager

- Provided data center strategy consulting for an executive strategy, data center Roadmap (Conceptual Master Planning) for this Honolulu-based public hospital
- Lead Data Center Trusted Advisor/Program Manager for a new data center design, build, and migration program.

Valero Energy Corporation

Program Manager

Provided program management for a 20,000 square foot data center design, build, and migration program for the largest refiner in North America. HP CFS CFC also provided network architecture design and structured cable project management.



Board of Governors of the Federal Reserve System

Program Manager/ Lead Trusted Advisor

- Provided data center program and migration consulting for an executive strategy, data center Roadmap (Conceptual Master Planning) project regarding data centers for the Board of Governors
- Lead Trusted Advisor for 3 year Data Center Program, overall HP Program Manager for Design/Build/Migration Program

Eisenhower Medical Center

Program Management/Consulting

Migrated data center from an aging facility into new \$200M building. Provided program management, analyzed and inventoried infrastructure components, connections, and applications, provided migration analysis, design, and planning.

Ohio State University

Program Management/Consulting

Provided data center program and migration consulting for an executive strategy, data center Roadmap

Toyota North America

IT Transformation and Strategy Consulting

IT Transformation/Strategy Workshops and IT transformation and strategy consulting for an executive strategy and project/program roadmap for transforming IT for three major divisions (TMS, TEMA, and Tsusho) of Toyota North America.

Additional Project Experience

Projects and Programs: Data Center Trusted Advisor, Migration and Data Center Strategy Services

- Exxon Mobil, Houston, TX – Data Center Strategy
- Merck, Branchburg, NJ – Data Center Program Trusted Advisor
- WorkSafeBC, Vancouver, British Columbia – Data Center Roadmap
- Royal Dutch Shell, Calgary, Alberta – Data Center Evaluation and Remediation
- Kingdom of Saudi Arabia, Ministry of Education – Critical Facilities Optimization Service
- Kingdom of Saudi Arabia, SIMAH (Credit bureau organization under Saudi Arabia Monetary Authority (SAMA) – Data Center Roadmap
- Library of Congress, Washington DC – Data Center Roadmap
- BCI (Banco de Credito), Santiago, Chile – Data Center Roadmap
- US Bank, Minneapolis, MN – Data Center Roadmap
- Qtel, Doha, Qatar – Data Center Strategy
- SunGard Capital Markets, Salem, NH – Data Center Program Trusted Advisor (multi-year program)
- Devon Energy, Oklahoma City, OK – Data Center Migration
- Al Rajhi Bank, Riyadh, Saudi Arabia – Data Center Roadmap and Migration Strategy



- National Commercial Bank (NCB), Riyadh, Saudi Arabia – Data Center Roadmap
- TJX Companies, Boston/Framingham, MA – Data Center Trusted Advisor, Migration and RFP Development (multi-year program)
- Equinix, San Jose, CA – Global Data Center Roadmap
- Hydro Quebec, Canada – Data Center Roadmap
- International Securities Exchange, New York, NY – Data Center Migration Program
- Nationwide Insurance, Columbus, OH – Data Center Roadmap
- State Farm Insurance, Bloomington, IL – Data Center Roadmap
- Walgreens, Inc., Chicago, IL – Data Center Program Trusted Advisor

Education and Training

Advanced Studies, Secondary Education – Civil Engineering, University of Texas, Austin

Advanced Degree Studies, Secondary Education – Bachelor of Science – Business Administration, Information Systems (BSBA IS), University of Colorado, Denver

Graduate Studies, Secondary Education – Telecommunications, University of Colorado, Boulder

Graduate Degree Studies, Secondary Education – Master of Science – Information Systems (MS IS), University of Colorado, Denver

Training:

- Hewlett-Packard Company, HP Master Program Manager
- IBM Training – Global Services Method, BCP, World Wide Project Management Method, Server/Application Consolidation Methodology, Infrastructure Resource Management, Networking Services, Desktop Lifecycle Management, Business Continuity Recovery, Review for Experienced Project Managers, 7 Keys to Project Success

Certifications and Expertise

Certifications

Current Certification	Year Attained
Project Management Institute (PMI) — Project Management Professional (PMP)	2003

Expertise

Expertise
Natural Gas Industry Expert Speaker, Utah Y2K Association, Salt Lake City, UT
Adjunct Instructor – University of Denver Law School, University of Colorado at Denver, and Red Rocks Community College



Laura Cunningham

Business Consultant

Experience Summary

Laura is a Senior Business Consultant with extensive experience in: Developing technology-based business cases for enterprise-level clients emphasizing Total Cost of Ownership (TCO) and Return on Investment (ROI); addressing the challenges facing CIOs including the need to reduce costs and deliver innovative solutions; collaborating with technical teams in determining the business and financial impact of proposed IT solutions; advising clients on short-term and long-term strategic plans based on current state business practices compared with future state vision; presenting findings in order to obtain approval for major IT investments.

Laura is a Certified Public Accountant whose practice has spanned the Professional Services, Financial Services, Banking, Manufacturing, Utilities and general business spaces.

Before joining HP, Laura held senior associate roles within regional CPA firms. She honed her financial analysis skills while working as a liquidity manager for a major financial institution. As a result, Laura brings a highly analytical approach to the discovery and calculation of the financial analysis.

Relevant Project Experience – HP Critical Facilities Services

Global Colocation Provider

Benchmarking – Capex Spend Assessment

Developed benchmark comparison for global services provider in order to identify how Capex spend differs between locations regionally and industry wide in order to identify ways to increase market share and to reduce spend. Report was leveraged by executive committee to drive significant change in strategy, design and operations.

Global Insurance Provider

Data Center Transformation Business Case Development

Developed business case to evaluate strategies to consolidate existing data centers. IT infrastructure had grown to hundreds of facilities world-wide as a result of mergers and acquisitions. Identified opportunities for greater business agility and flexibility. Estimated reduction in operating expenses of over 30% annually.

Global Commercial Lender

Data Center Transformation Business Case Development

Developed multi-country business case to refresh, standardize and consolidate infrastructure and services. Financial analysis considered the fact that the company was underinvested in IT, and highlighted the incremental investment to transform the environment. Estimated reduction in operating expenses of over \$25million in three years which could be reinvested in innovation.

Major Manufacturing Company

Data Center Roadmap Consulting

Evaluated the current state of the existing global data centers and provided future state recommendations to accommodate for technology growth over the next 10 years. Company facilities were distributed and risk of downtime was high. Quantified and identified the future



state strategy for the amount of resiliency required and the multi-million dollar investment was approved by executive committee.

Automobile Manufacturer

Data Center Roadmap Consulting

Company had aging facilities that required substantial remediation in order to meet current design practices and to support North America operations. Collaborated with client team to investigate future state data center scenarios derived from business requirements. Provided financial analysis necessary to substantiate funding request to remediate existing data center and to budget for capital necessary for new architecture.

National Financial Cooperative

Data Center Migration Planning

Reviewed the current IT Environment in order to determine the migration readiness, approach, timeline and milestones. Worked closely with client personnel to prepare an estimated migration budget in order to quantify the impact and benefits of the migration alternatives. Company was provided the necessary materials to weigh alternatives, to mitigate risk and to substantiate funding request for the future migration.

Education and Training

Certificate in Accounting, University of Washington, WA, USA, 2006

Bachelor of Science in Business Administration (Finance and International Business focus), University of Colorado, CO, USA, 2000

Training:

- CPA Continuing Education (Current)

Certifications and Expertise

Certifications

Current Certification
Certified Public Accountant

Expertise

Expertise
Presented at HP Discover – HP's US annual technology conference in 2012 and in 2014
Writings featured in HP's Transforming IT Blog



Brian Donabedian**Senior Data Center Consultant
Critical Facilities Consulting****Experience Summary**

As a member of the Critical Facilities Consulting team, Brian uses his expertise with the physical infrastructure layer of data centers to help clients develop data center strategies that align their physical infrastructure needs to their hardware requirements. Brian provides long-range planning for space, power, and cooling based on IT growth trends, emerging technologies, and the optimization initiatives that my colleagues develop for a given engagement. Brian also helps guide clients to optimize their data center infrastructure management and operating efficiency.

Prior Experience

Prior to joining Critical Facilities Consulting, Brian worked with the renowned HP Labs to transfer the technology of Smart Data Centers to HP Services. Through that effort, Brian emerged as the technical delivery lead for the HP Data Center Thermal Assessment services using computational fluid dynamics principles to model the thermodynamics of today's high-density data centers.

Brian's 40-year career started with 24 years at Digital Equipment Corporation as a Site Planner & Environmental Consultant, influencing the planning, design, construction, and infrastructure operation of data centers and development labs for Digital and its customers. In this dual function, he designed new and expanded existing spaces ranging from 300 to 30,000 square feet. After the Digital / Compaq merger, he focused on solutions for the emerging cooling challenges presented by high-density server environments.

Relevant Project Experience – HP Critical Facilities Services**Data Center Strategy Experience*****Southwest Airlines* 2014**

Helped develop a 10-year strategy to optimize their data center topology in support of their expected growth

***Department of Defense* 2013**

Spent this year assessing five major Department of Defense sites totaling 45 data centers to develop a gap analysis of current capabilities versus future requirements from a space, power, cooling, and resiliency perspective.

***National Institute of Allergy and Infectious Diseases* 2012**

National Institute of Allergy and Infectious Diseases, Rocky Mountain Laboratory, developed 10-year roadmap for the consolidation of IT services, support of explosive storage growth, and increased availability.

***Navy Marine Corps Intranet* 2012**

Navy Marine Corps Intranet (NMCI), assessed viability of existing data centers to continue support of the NMCI mission.



U.S. Bank	2012
Developed a data center strategy to enhance business resiliency and support growth through mergers and acquisitions.	
State Farm Insurance	2011
Developed a data center topology to consolidate multiple data center and improve operating costs for energy.	
Corning Inc.	2011
Consolidated three data centers down to one Brownfield and one collocation.	
Library of Congress	2011
Library of Congress, determined lifespan for existing data centers identifying the timeframe for power and cooling upgrades as well as identifying several data center management issues.	
Al Rajhi Bank	2010
Al Rajhi Bank, Saudi Arabia, defined long-term space, power, and cooling requirements for a new data center facility.	
TJX Companies	2010
TJX Companies, develop equipment layouts and rack elevations as part of a Greenfield design and consulting effort.	
TD Bank	2010
TD Bank, Canada, consolidated several data centers and acquisitions into a primary/secondary data center topology including a Greenfield build and Brownfield renovation.	
Spectrum Health Systems	2009
Consolidated several data centers into a new data center topology to support future growth and acquisitions.	

Site Planning Experience

Brian currently provides ongoing services to the Department of Defense for the site planning and installation of large high performance computing systems deploying water-cooled cabinets supporting 30+kW loads per cabinet. These systems range from 4 to 50 + cabinets and upwards of 10,000 nodes. Brian has planned approximately 30 large systems in the past 15 years.

Education and Training

Attended continuous education programs specific to data center infrastructure at the following institutions:

- University of Wisconsin, Extension programs
- Electrical Construction & Maintenance Magazine
- Northeastern University
- Marshall Institute
- General Electric
- Green Grid Forums
- National Fire Protection Association
- Hughes Institute
- Association of Energy Engineers
- The Uptime Institute
- Data Center Journal Education



Bradford Blair

Senior Consultant
HP Critical Facilities Services**Experience Summary**

Mr. Blair is a result driven IT professional with extensive experience in engineering, design and support of information systems. He specializes in data center strategy, design, and project management, with in-depth expertise of Disaster Recovery and Business Continuity. Mr. Blair has a proven ability to lead and motivate project teams to ensure success and a track record of diagnosing complex problems and delivering effective solutions.

Relevant Project Experience – HP Critical Facilities Services**Royal Bank of Canada**

2008 - 2010

Primary Consultant, Project Manager

Performed Trusted Advisor role for a Greenfield data center as well as an expansion of a secondary data center. Services delivered throughout the engagement included programming, capacity planning, site selection, RFP development, detailed design evolution, network validation, energy modeling, and program management.

International Oil and Gas Company*Primary Consultant*

Performed data center strategy and capacity planning services for a new petrochemical spinoff of a major oil producer. Provided Brownfield assessments, assorted design services along with associated ROM costs.

Global Travel Company*Primary Consultant*

Provided disaster recovery strategy development and alignment of future state data center topologies. Studies performed included validation of the proposed future state IT requirements, and the capabilities and configurations of the planned technologies and facilities to support these future state requirements.

Global Bank*Primary Consultant, Project Manager*

Provided a Peer Review for a Global Data Center Initiative where the conceptual plans were reviewed and validated confirming current and future state technology strategies, growth models, capacity plans, data center options, "green" initiatives and financial analysis.

Global Trading Exchange*Primary Consultant, Project Manager*

Strategic consulting to deliver high-level, high-performance IT/networks, master planning, design, implementation, and project management. Consolidated multiple facilities and provided assessment services.



Global Financial Institution*Primary Consultant, Project Manager*

Strategic consulting, design and budget creation for a Greenfield multi facility cloud computing campus comprised of 26 facilities. ROM cost creation for different construction methodologies applicable within several target countries.

Global Financial Institution*Primary Consultant, Project Manager*

Multi-site assessment and single point of failure analysis to provide master plan development for overall data center strategy. Delivered multiple mechanical, electrical and plumbing options for mitigation of discovered points of failure.

State of New York*Secondary Consultant, Project Manager*

Provided professional strategic assessments and validations for the New York State (NYS) Office of the Chief Information Officer (OCIO) and the NYS Office for Technology (OFT)'s overall operational model in order to ensure that business, technology, and facilities elements are in sync with the possibility of deploying a Tier-4 data center operational model. Primary focus for the project was to evaluate the overall readiness of the existing operational environment and to evaluate the OCIO/OFT's business objectives so as to integrate all elements of business, technologies, and facilities within the appropriate levels of resiliency, availability, continuance, and scalability.

Major Data Center Construction Firm*Secondary Consultant*

Provided "think tank" support for vertically designed data centers for utilization in major metropolitan areas.

Education and Training

Bachelor of Science, Marketing Management, Computer Science, Bentley College, 1985

Certifications and Expertise*Certifications*

Current Certification	Year Attained
Certified Functional Continuity Professional, Disaster Recovery Institute	2006



Sam Rizzo

Critical Facilities Strategy

Experience Summary

Sam Rizzo has been a recognized expert on facilities engineering/management and data center services with over 25 years of experience including opening 37 data centers from analysis through commissioning and operation. Additionally, he has authored respected articles/white papers on facility design, management and operations.

Sam is a proactive leader who has managed professional teams and budgets of over \$150M annually. He has engineered, built and managed over 3M sq. ft. of N2+2 high-tech facilities in over 75 sites internationally.

Sam has a history of creating positive and collaborative work environments. He has championed innovative ideas and organized cross-functional groups to accomplish key objectives in a cost effective, timely manner. He has built shareholder value by developing and redesigning business processes for emerging markets, planning and controlling budgets, and leading change. He has solid knowledge of network, mainframe, midrange and distributed systems.

Relevant Project Experience

HP EYP Mission Critical Facilities, Inc.

Principal Consultant

To date for HP/EYP CFS, Sam has/is providing leadership and guidance as a professional principal consultant by advising management and/or technical teams in the areas of business, operational continuity, technology, and data center facilities. Sam is established as serving the position of "Trusted Advisor" to customers in providing an "end to end" solution for managed services and colocation as a "Future State Option". This process identifies, through the above analysis, how a company can be best served by providing highly innovative solutions to create their next generation data center either in-house or outsourced.

- Identified market opportunity, wrote business plan, enlisted top-notch executive team and attracted advisory board members comprised of "IT," financial and real estate experts.
- Built strategic alliances with key partners to provide in-demand services such as virtualization (server & desktop), privatized cloud computing, outsourced "IT," network technologies, green initiatives and the internalizing of disaster recovery and business continuation planning.

Incessant Data Center Development

Executive Vice President

Led Start-up Company focused on helping corporations develop their "Next Generation Data Center." Created an "IT" and network centric end-to-end solution from 20 years of synergistic experience, unbiased objectivity and cost effectiveness in designing, retrofitting, building and managing state-of-the-art facilities. Advanced these core competencies into an integrated strategy to align emerging technologies and initiatives such as virtualization, cloud computing, tiered storage and green computing into the entire tactical process.



SunGard Availability Services

*Vice President, Facilities Engineering/Management/Corporate Real Estate
Senior Director, Facilities Engineering/Management*

Provided strategic leadership to 3 separate operations, developing and managing annual budget of \$100-150 million. Led international team through 4 senior directors. Directed and managed budgets across national, multinational, and global regions. Established corporate guidelines for facilities engineering team and oversaw construction/renovation projects. Managed corporate real estate acquisitions of Comdisco and Guardian.

- Built collaborative "Virtual Department" to ensure the needs of Operations, Finance, HR, and Engineering were incorporated into real estate decisions upfront. The initiative has saved an average of \$4.5 million annually in operating expense and capital expenditure over the last 4 years.
- Developed post-9/11 business model, including opening huge new high-tech facility to seat 4,000 of NY's largest financial players after major catastrophe. Generated 10-year projected revenues of \$80 million.
- Led design and construction of 5 new data centers within one 7-month period. SunGard achieved 175% of operating income goal in 2000 due to these new facilities.
- Led consolidation for multiple newly acquired sites across the UK, reengineered UK facility to support 200,000 sq. ft. of managed services, and collaborated with French architects/engineers to construct "out of the ground" recovery facility, leading to record-setting revenues for both the UK and France.
- Played key role in positioning SunGard as a leader among Fortune 500 companies (#1 in Pennsylvania) for carbon offset strategies and sustainability. Strategy included extensive environmental compliance program, corporate-wide guidelines and use of wind power.
- Facilitated entry into Internet managed services, co-location and application hosting through facility design that has been recognized as "Best in the Industry" since 2001 and cuts industry-standard construction costs by over 25%.
- Prepared 28 high-tech facilities throughout North America for Y2K. Passed audits and provided customer assurance to 70% of Fortune 1,000 customers, with zero issues.
- Saved \$13 million per year and beat sales targets 25% for 2 years in a row by consolidating 20 facilities in North America within 13 months, migrating all technology and networks to accommodate relocations.

Director, Facilities Engineering & Systems Hardware Architecture

- Played key role in 200% sales increase over 5-year period by directing design and business development of data centers in 15 Tier-1 cities across North America and South America within 30 months.
- Worked jointly with Data Switch Corporation to introduce "light fiber" connectivity within the mainframe environment, leading to recognition for SunGard as the first disaster recovery provider to implement and improve mainframe channel connectivity (a breakthrough achievement at the time).

Senior Manager, Facilities Engineering & Systems Hardware Architecture

Formulated business model and engineering development for "Lights Out" Command Center and Network Operations Center for disaster recovery product offering. SunGard became known as a pioneer of these system configurations/operational concepts and a leader in customer satisfaction.



Manager, Computer Operations & Project Engineering

Became company's first Operations Manager of Recovery Services, leading group of 10 "IT" analysts supporting Fortune 500 corporations in disaster recovery testing of systems and telecommunications.

Education and Training

Spring Garden College, University of Pennsylvania, Wharton School of Business

Training:

- Coursework, General & Specific Studies – Wharton School of Business; Spring Garden College
- Business Continuity Planner – Disaster Recovery Institute
- Master Facility Executive - BOMI Institute

Professional/Community Affiliations

Vice President, Treasurer, Board of Governors Member and Executive Member of the Greater Philadelphia Chamber of Commerce



Tao Tao Data Center Transformation Business Consultant Master Solution Architect

Experience Summary

Tao Tao is seasoned business and technology consultant within HP TS Solution Infrastructure Consulting Organization. Tao is a veteran IT professional with over 15 years of IT management and infrastructure optimization/transformation experience; a seasoned IT solution architect and project manager in tier 1 consulting firms with solid experience in both sales and delivery of enterprise-scale IT projects, mostly with Fortune 100 clients.

Toa has board knowledge and experience of all aspects of Information Technology systems: IT Strategy, Cloud Computing, Data Center, Facility, Servers Platforms, Storage, Network, Telecom, Security, Messaging, Directory, Disaster Recovery/Business Continuity, End User Computing, IT Service Delivery and Support, and full lifecycle of application development.

Tao has led many enterprise data center transformation programs that including data center strategy, next generation data center facility, infrastructure (server, storage, and network) transformation, IT governance and program management.

Tao's project implementation and management background has encompassed a number of industries such as Energy and Utilities, Retail, Hi-Tech and Telecommunications, etc.

Relevant Project Experience

HP Infrastructure Transformation Practice **2007 - Present**

Master Business Consultant **2011 - Present**

Manage full lifecycle IT infrastructure optimization and consolidation projects with large clients for HP's Infrastructure Transformation Practice. Lead pre-sale and delivery team on the analysis, planning, and execution of large scale IT infrastructure transformation programs.

- Data Center Consolidation, Migration and Relocation
- Server Consolidation and Virtualization
- IT Infrastructure Optimization and Transformation
- IT services outsourcing
- Enterprise IT Strategy and Roadmap

Senior Solution Architect **2007 - 2010**

Managed full lifecycle of IT infrastructure optimization/consolidation projects with large clients for HP's Infrastructure Transformation Practice. Led pre-sale and delivery team on the analysis, planning, and execution of large scale IT infrastructure transformation programs. Created DC transformation methodology and program delivery collaterals.

- Data Center Consolidation/Migration/Relocation
- Cloud Computing (Assessment and Strategy)
- Server Consolidation and Virtualization
- IT Infrastructure Optimization and Transformation
- IT services outsourcing



Highlighted Projects

- Lead Data Center Consolidation Program for Devon Energy Corporation. Successfully consolidated and migrated 2000+ servers and storage to new enterprise Data Center, Oklahoma City, OK.
- Lead Data Center Migration for Valero Energy Corporation. Successfully migrated 800+ servers and storage systems to new Data Center, San Antonio, TX.
- Lead for Data Center Migration for Healthways Inc. Successfully migrated 200+ production servers and enterprise storage systems, Nashville, TN.
- Lead Data Center Consolidation/Relocation for VA Information Technology Agency (VITA), virtualization and migration of 1200+ servers for Commonwealth of VA to new Enterprise Solution Center in Chesterfield, VA.

Previous Experience***Senior Data Center Consultant, Accenture, LLC***

Lead IT infrastructure consolidation projects for large and medium clients for HP Services, Consulting and Integration Group. Lead analyzing, planning and execution of large scale IT infrastructure optimization projects.

- Data Center Consolidation/Migration/Relocation
- Server Consolidation and Virtualization
- IT Infrastructure Optimization and Transformation

IT Director, McCalla Raymer, et al LLC***2004-2005***

Manage corporate IT environment, transformed IT infrastructure to support rapid business growth.

- Optimized IT operation reduced OPEX by 50% (\$2M) to fund Infrastructure Transformation
- Implemented DR strategy and built out the DR DC
- Server consolidation and virtualization
- Storage/SAN and backup consolidation
- Directory/Messaging consolidation

CTO, Place Properties, LP***1999-2004***

Provide leadership in management for company wide information technology, and oversee the operation of IT department

- Managed IT environment to support 2000% business growth
- Managed ISP service to 8000+ customers with \$2.5M revenue
- Established IT policies and procedures
- Developed IT staff and organization

Education and Training

Master's Degree in Computer Science, Georgia State University, Atlanta, GA



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Expertise

Expertise	
Spoken Languages: English and Chinese	
Business Development	Business Development
Project Management	Written and Verbal Communication
Business Management	Program Management



Jeff Gum

Technology Consultant

Experience Summary

Jeff is an Infrastructure Consultant with extensive experience in datacenters. He has 24 years of IT systems experience, and 14 years of experience as a technical lead for IT datacenter projects. Jeff has been designing virtualized systems for 8 years, with a specific focus on VMware for the past 5 years. He is skilled on a wide array of datacenter infrastructure, including servers, storage systems, networks, operating systems, cabling, and facilities infrastructure. Jeff has been a lead in several IT migration projects, including both software and hardware migrations.

Primary technologies: VMware 4, VMware 5, VMware SRM, Microsoft Windows servers, Active Directory, DNS, DHCP, IIS, Microsoft SQL Server, Linux servers, Cisco networking, routing, voice, and firewalls; networking cabling, SAN storage, including HP P4500 series, SAN fabric, SAN zoning, HP c7000 blades and enclosures.

Jeff is an outstanding contributor to project teams, and has a knack for both mentoring others, and conveying complex information in a way that all levels can understand. Along with the technology expertise, Jeff is also able to understand business needs, and help to bridge the gap between technology and business. Jeff is a U.S. Citizen.

Relevant Project Experience

HP Enterprise Services

VMware Lead*Jul. 2013 – Nov. 2013*

SAP Migration project for California Department of Corrections. This project involves the technical migration of production SAP systems from AIX to Linux, hosted on VMware.

Responsibilities include:

- Work with the client to develop a VMware deployment plan, ensuring the VM guests are provisioned with the correct resource allocations, including provisioning of network connections, storage planning and allocation, installation and tuning of VM guests.
- Assist the client and the HP SAP team in sizing and protecting the SAP VM guests to provide sufficient performance and failover.

Infrastructure Support*Jan. 2013 – Jun. 2013*

Software Development project for State of Florida. This project involved the support of a medium-size infrastructure environment being used to develop and deploy a state-wide IT software solution. Responsibilities include:

- Discover and diagram IT systems including blade servers, blade enclosures, SAN, networking, firewalls, and load balancers.
- Provide infrastructure support to the development team.
- Provide statistics and input to a sizing sub-project being used to build up IT infrastructure resources prior to go-live.

Implementation Lead*Sept. 2012 – Jan. 2013*

VMware Implementation (including Site Recovery Manager) project for New Jersey Department of Agriculture. This project involved a VMware production implementation onto new hardware, including a systems migration plan and failover design. Responsibilities include:



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- Evaluate systems, storage, and networking, and design a systems migration plan to migrate physical environments to a VMware environment.
- Implement VMware onto new hardware, including provisioning network connections, storage planning and allocation, installation and tuning of ESXi 5.1 and vCenter.
- Implement VMware's Site Recovery Manager (SRM), design and test SRM recovery plans.

Storage / Systems Consultant

Sept. 2011 – Nov. 2012

Data Center Migration project for University of Utah. Responsibilities include:

- Developed (with a team) a complete migration plan for all moving datacenter resources from 3 datacenters into 1 new large datacenter.
- Reviewed the client's virtual and storage environment design, and assist with accounting for clustered services, blade server retirement, and applications to be virtualized.
- Oversaw the delivery of the migration plan, ensuring the plan was carried out successfully by our HP technicians.

Education and Training

- Bachelor of Science – Computer Technology – Indiana State University, 1993
- Bachelor of Science – Electronics Technology – Indiana State University, 1993
- Aerospace Technology minor – Indiana State University, 1993
- Certified Xitech BSC SAN Administrator, May 2011
- Army Level 1 & Level 2 Information Assurance Training, 2007

Expertise

Expertise	Years of Experience
Relevant Technical Expertise:	
VMware	5
Virtualization technologies	8
Storage / systems design	9
Servers / systems design	15
Networking	24
Systems Administration	24
Project Expertise:	
IT Project Technical Lead	14
Industry Expertise:	
Manufacturing	11
Retail	5
Education	5
Government	3



Ado Ellzey

Business Consultant IV Infrastructure Modernization

Experience Summary

A senior level business process professional /consultant with an extensive background in technology, marketing, business processes, and project management. Responsible for project management activities to upgrade applications and server technologies. Developing Best Practices for client team to conduct server take-on activities.

Relevant Project Experience

HP Enterprise Services

Project Management

Jul. 2013 – Jan. 2014

- Provided client with Best Practices to migrate applications and servers to HP Managed Data Centers.
- Provided application portfolio assessment and analysis via client interviews with application owners, SMEs and architect.
- Presented application analysis to Rolls-Royce Architect, Technical Governance Board and Architecture Review Governance Board for final approval.
- Collaborated with Migration Services team to analyze application and server environment.

Project Management

Jul. 2013 – Sept. 2013

- Conducted infrastructure assessment of client environment.
- Assisted Enterprise Architect with milestone documents for HP team and client management.
- Assisted with development of Global Strategy and IT Governance.
- Developed executive infrastructure presentation with long-term strategies.

Project Management

Mar. 2013 – Jun. 2013

- Conducted application & server information interviews with management team and Subject Matter Experts (SMEs) at UTC/Goodrich.
- Analyzed application and server information to create appropriate groups for movement.
- Focus point for management weekly summary and updates.

Project Management

Sept. 2012 – Jan. 2013

- Provided Project Management functions for Active Directory migration of 5400 servers from Cadbury into krft.net domain.
- Managed daily Run List of objects (machines, accounts) for daily migrations.
- Managed client migration issues with the Service Desk Team.
- Developed weekly Executive Summary of successes and risks.
- Led the Kraft Foods Europe (KFE) region through successful migrations.



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Project Management

Apr. 2012 – Jun. 2012

- Conducted application inventory analysis.
- Assisted with the definition requirements for CMDB based on application information stored in five databases.
- Led the team in documenting application standards for CMDB development.
- Conducted application inventory analysis.

Project Management

Feb. 2012 – Apr. 2012

- Conducted application analysis/assessment of 99 applications installed on 237 enterprise and store servers.
- Analyzed applications for virtualization candidacy.
- Analyzed applications for migration or upgrade strategy.
- Created application data for Solution Team's final recommendation/presentation.

Project Management

Mar. 2011 – Nov. 2011

- Conducted BP management interviews to assist in effective analysis.
- Conducted application contexting analysis to perform server grouping of 5500 servers.
- Developed selection criteria to aid in consistent data analysis for the Infrastructure Modernization (IMOD) Team.
- Developed tracking process to help track progress of servers that are part of the transition services project.
- Led discussions with BP Segment Reps and subject matter experts to understand the server environment.

Project Management

Oct. 2010 – Feb. 2011

- Conducted 100+ application & server information interviews with management team and Subject Matter Experts (SMEs) at Coca-Cola.
- Modified analysis template for easy capture of information from remote management and SMEs.
- Analyzed application and server information to create appropriate groups for movement.
- Conducted analysis on Top 100, critical, and Atlanta Computer Center application for movement to HP Tulsa, OK site.
- Participated on team that developed final executive management presentation.

Education and Training

- Accounting – Bachelor of Science, Alcorn State University, Lorman, MS
- Business Administration – Bachelor of Science, Alcorn State University, Lorman, MS
- Project Management – Master Certificate, George Washington University, Washington, DC
- MBA – University of Phoenix, Sandy Springs, GA



Certifications and Expertise

Certifications

Current Certification
PMP Qualified (Exam prep)

Expertise

Expertise	Years of Experience
Relevant Technical Expertise:	
Windows Server 2008	3
Windows 2000 Server	4
Working knowledge of VMware products	8
Working knowledge of Windows base platforms and tools	6
Relevant Project Expertise:	
Project / Business Process Leadership	25
Relevant Industry Expertise:	
Banking/Finance	6
Education	6
Information Technology	30
Government	12
Utilities	6

6. Provide an organization chart that shows the relationship of the people who would be assigned to the project and the deliverables they will be responsible for. Include an escalation plan showing the chain of command for issue resolution.

HPES' proposed Phase 1 project organization with deliverables responsibility is depicted in Figure 5. Responsibility for deliverables falls to our two key resources, Carl Greer (Program Manager) and Tom Wilson (Lead Consultant)

Carl Greer – Program Manager

- Deliverables Responsibility –
 - Guide Asset Inventory (Physical and Applications)
 - Replacement Items

Tom Wilson - Lead Consultant

- Deliverables Responsibility –
 - Strategic Plan
 - Business Case
 - Facilities Selection Process (Scope for Phase 2 RFP)



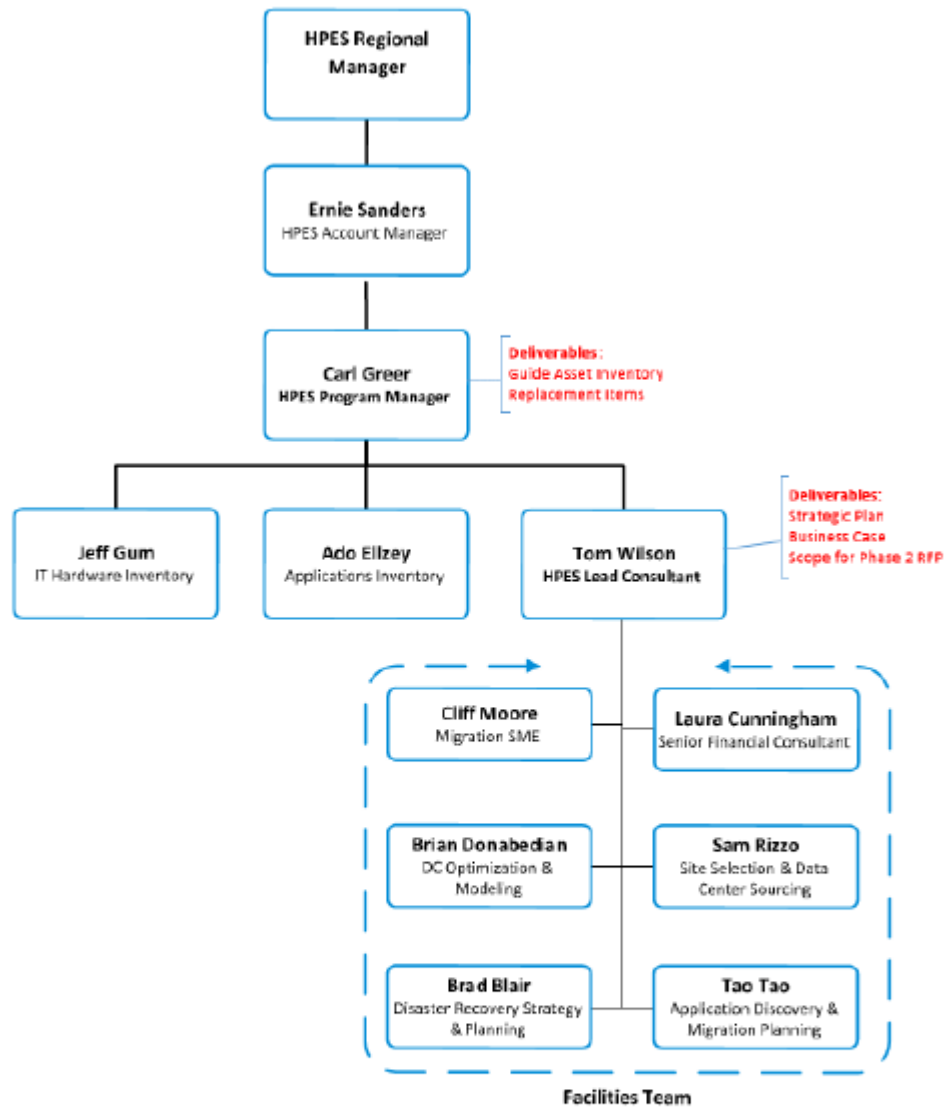


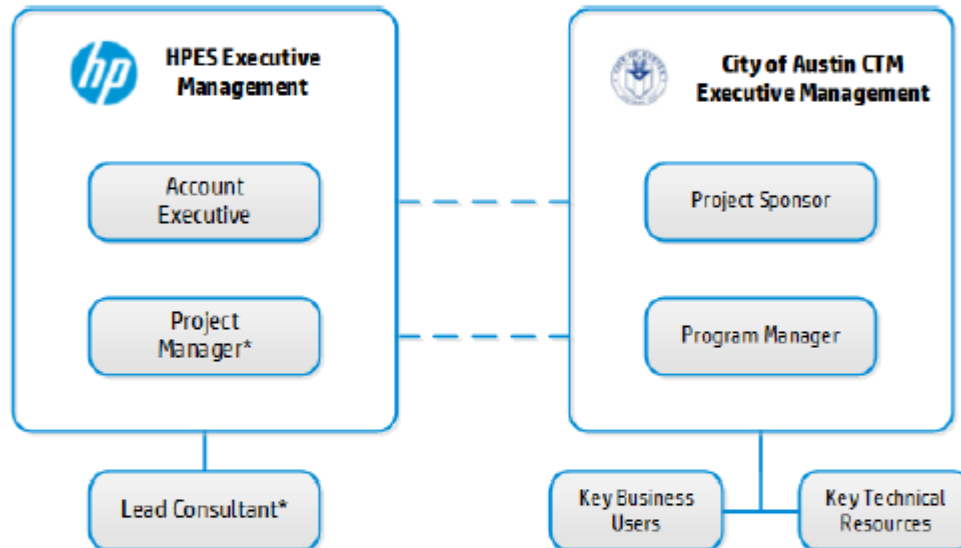
Figure 5 - HPES Project Organization with Deliverables Responsibilities



Escalation Plan

The HPES organizational structure for delivering this project focuses on involving SMEs and experienced business analysts in the requirements gathering and validation phase of the project. Our team will work closely with the CTM project manager to review project status and deliverables to determine customer satisfaction levels. It is critical to work together, creating a seamless project team to enable and facilitate smooth knowledge transfer between all parties. Involving HPES in all aspects of the project, both business and information technology, enables ongoing knowledge transfer, better positioning CTM staff to learn the inner workings of the solution and providing required support for long-term stability.

Figure 6 shows how the HPES key personnel will collaborate with the CTM staff during the life of the project.



* Key Resource

Figure 6 - HPES – CTM Key Resource Correspondence

Issue Escalation Process

The key resource organization chart above serves as a starting point for a final project escalation process. Timely resolution of issues is critical to maintaining engagement control and meeting the City of Austin's objectives. The purpose of the escalation process is to see that we identify and resolve issues quickly. The escalation process provides a mechanism to alert the HPES PM and other management personnel to issues that could not be resolved at a lower level.



We expect that the City of Austin and HPES will agree upon a governance model for the project during the initial kick-off meeting with the entire team at the start of the project and we will implement the model within the first week of the project. The HPES PM will document the final escalation plan.

1. Either HPES or the City of Austin may escalate an engagement issue as follows:
 2. Raise the issue initially to the HPES PM (Carl Greer).
 3. If not resolved at this level, an issue report will be generated and the issue will be escalated to the HPES Account Executive (Ernie Sanders).
 4. Certain internal HPES issues may need to be escalated to the HPES Account Executive for resolution.
7. Provide examples of your professionalism such as participation in professional organizations and publication of documents, white papers and journal articles written by the individuals in your organization. Also provide examples of your leadership in developing industry standards such as the American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE) chapters, the European Union Code of Conduct for Data Centers and LEED Standards for Data Centers and other similar organizations.

Professional Associations and Societies

HP holds membership in hundreds of professional associations and societies around the world. A listing of some of these organizations is available online at <http://www.hp.com/hpinfo/about/hp/government/association.html>.

The proposed delivery team for this engagement belongs to a number of IT and Data Center Industry Organizations such as

- Disaster Recovery Institute [2006]
- Certified Functional Continuity Professionals
- 7 x 24
- Data Center Dynamics
- IEEE (Professional Association for the Advancement of Engineering & Technology).
- Project Management Institute (PMI)

Standards Bodies and Consortia

HP is recognized as a leading contributor to industry standards through its active participation in the industry consortia and standards bodies that shape the international standards for computing. These organizations include:

- Advanced Configuration & Power Interface (ACPI)
- Association Française de Normalisation (AFNOR)
- American National Standards Institute (ANSI)
- Alliance for Telecommunications Industry (ATIS)
- Bitkom (Germany)
- China CESI (China Electronic Standardization Institute)
- Consumer Electronics Association (CEA)
- Deutsches Institut für Normung e. V. (DIN)



- Deutsche Kommission Elektrotechnik (DKE)
- DIGITALEUROPE (DE)
- Digital Living Network Alliance (DLNA)
- Distributed Management Task Force, Inc. (DMTF)
- Ecma International
- Electronic Industries Alliance (EIA)
- Italian Association for ICT Standardization (UNINFO)
- Ethernet Alliance
- European Telecommunications Standards Institute (ETSI)
- The Green Grid
- Information Systems Audit and Control Association (ISACA)
- Information Technology Industry Council (ITI)
- Institute of Electrical and Electronics Engineers (IEEE)
- InterNational Committee for Information Technology Standards (INCITS)
- Internet Engineering Task Force (IETF)
- Java Community Process (JCP)
- Mopria Alliance
- Near Field Communication Forum (NFC Forum)
- Object Management Group (OMG)
- Open Networking Foundation (ONF)
- Optical Internetworking Forum
- Organization for the Advancement of Structured Information Standards (OASIS)
- Peripheral Component Interconnect Special Interest Group (PCI-SIG)
- Singapore SPRING (Standards Productivity and Innovation Board)
- Smart Card Alliance
- Small Form Factor Committee (SFF)
- Standard Performance Evaluation Corporation (SPEC)
- Storage Networking Industry Association (SNIA)
- Syndicat de l'industrie des technologies e l'information (SFIB)
- TechAmerica
- TechUK
- TeleManagement Forum (TM Forum)
- Trusted Computing Group (TCG)
- The Open Group (TOG)
- Union Technique de l'Electricité (UTE)
- United States Information Technology Office (USITO)
- USB Implementers Forum, Inc. (USB-IF)
- UPnP Forum
- VESA



- Wi-Fi Alliance
- Wireless Broadband Alliance (WBA)—Observer member only
- World Wide Web Consortium (W3C)

8. Provide proof of any Certifications and Licenses applicable to this Scope of Work

As per the City of Austin's RFP and its Addendums, no engineering work is required for Phase 1. It is HPES' understanding that no licenses are applicable to executing this trusted advisor consulting work.

If Professional engineering services were required, they would be offered and provided in accordance with local regulations governing such services. In the U.S., EYP Mission Critical Facilities, Inc., or an appropriately licensed entity under its direction, will offer and provide such engineering services. EYP Mission Critical Facilities, Inc. is a subsidiary of HP.

Proposed Delivery Team Certifications

The delivery team proposed for this engagement holds a number of certifications, including:

- Project Management Professional - PMI Institute
- VMware Certified Professional (VCP)
- Microsoft MCSE
- Cisco CCNA, CCNP
- Sun SCSA
- RedHat RHCSA
- Security +
- ITIL IT Service Management
- Certified Functional Continuity Professional
- CPA - Certified Public Accountant
- Business Continuity Planner - Disaster Recovery Institute
- Master Facility Executive - BOMI Institute (Building Operational Management Institute)
- High Performance Sustainable Buildings Principal - BOMI Institute
- Facilities Management Certificate – BOMI Institute
- Building Systems Maintenance Certificate – BOMI Institute
- Facilities Management Administrator – BOMI Institute



Tab 5 - Technical Proposal

Define in detail your understanding of the requirements presented in the Statement of Work. Describe your approach and methodology for providing your proposed solution. Provide all details as required in the Statement of Work (Section 500) and any additional information you deem necessary to evaluate your proposal.

The HP team understands that this engagement is to serve as a "Data Center Consultant/Trusted Advisor" to The City of Austin's (COA) Communications and Technology Management (CTM) Department for the duration and terms as outlined within this document for its Data Center Relocation (DCR) project.

The primary purpose of the overall DCR project is to relocate the City's primary Data Center to a suitable Collocation Facility and close down the existing two CTM data center sites within the next five years.

In support of the DCR, CTM is seeking to hire an experienced and qualified Data Center Consultant/Trusted Advisor to oversee the project planning, validation of current data center strategy, financial analysis, provide data center sourcing support and implementation activities.

HP's process for delivering these types of programs utilizes a team approach that consists of at least two (2) Senior Consultants (Program Manager and Lead Consultant) that will provide expertise across all facets of the data center planning effort.

The Program Manager and Lead Consultant will provide leadership, guidance, and expertise within a multitude of disciplines required throughout the Program within the following program phases:

- Program Management/Governance
- Master Planning Services
- Financial Analysis
- Facility Conceptual Design
- Data Center Sourcing and Selection
- Migration Planning
- Migration Implementation
- Phased Transition to Operations

1. Explain Project Management Methodology and how the Methodology will be used in this project. Specific focus should be given to data center risk assessment methodology & standards used to fulfill these types of projects.

The HP Project Management Methodology enables quality and efficiency through a defined, systematic method of project planning, control, and execution. You need a superior management process to carry out those business-critical projects—a time-tested, repeatable process to manage your budget, time, resource, and technology constraints. An efficient project management process helps you:

- Gain insight—prior to project start—of required effort, time, and cost
- Plan earlier and more effectively
- Use resources more efficiently
- Make better decisions through improved teamwork
- Communicate status, issues, and decisions more effectively



- Respond more flexibly to change
- Enhance product quality by using defined, proven processes
- Progress in a more stable mode through effective risk management

You save both time and money by following a thorough project management process. You're able to identify risks before they occur and avoid significant, costly changes late in the project. Detailed project planning results in a realistic, formalized project plan both you and HPES endorse.

HPES project managers are seasoned professionals with broad experience in managing projects and delivering solutions. We have 9,400+ experienced and qualified project managers across the globe.

Trained and Experienced Project Managers

HP's Project Management Development Program provides the training our project managers need to learn the latest techniques in all aspects of project management. Continually refreshed and updated, the 35-course curriculum is implemented throughout the world in 15 languages covering project leadership, management, communication, risk management, contracting, managing business performance, scheduling, cost control, and quality. We base the curriculum on the Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK). The curriculum also encompasses specialized courses on key HP internal topics, such as the project methodology and essential business and financial management skills.

All courses taught in HP's PM curriculum are registered in PMI's Registered Education Provider (REP) program to ensure a consistent basis and oversight.

Additionally, HP has a well-established program to encourage and support our project managers to achieve PMI's Project Management Professional (PMP) certification. PMP certification ensures that Project Managers have a solid understanding of recognized project management practices and the body of knowledge within the profession.

Managing Projects to Impact Your Business

As part of our project management methodology, HPES applies consistent processes, tools, and quality policies to drive project management and enable your success. Based on the Project Management Institute's (PMI's) Project Management Body of Knowledge (PMBOK), HPES Project Management integrates ten management disciplines across four project stages to achieve your project goals and positively impact your business. Together, the City of Austin and HP create a roadmap for project success.

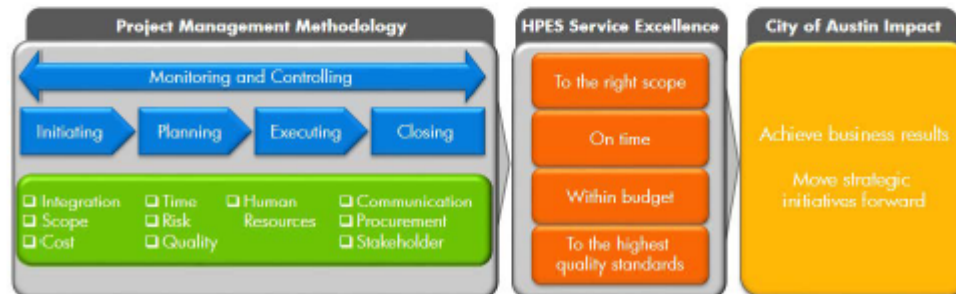


Figure 7 - Using HPES Project Management to Achieve Results



Project Management Deliverables

Project Schedule

HPES, if awarded, will create the formal project schedule necessary to implement the project. These service areas are further defined, along with their deliverables, in the following sections. The timeline in Tab 5, Item #6 represents a preliminary project schedule and timeline that is anticipated during the course of the project.

After the project schedule has been approved by CTM and baselined, the HPES PM will manage the HPES resources to complete tasks according to the schedule. The HPES PM is also responsible for closely monitoring the scheduled tasks to be performed by HPES resources, evaluating them for thoroughness, verifying that work is being accomplished as planned, validating that we add resources and release them as needed, and providing updates to the tasks to the CTM PM as work progresses. The HPES PM will communicate schedule updates and variances to CTM management in the weekly status report and status meetings.

Project Status Reporting and Communications

A strong commitment to establishing free, open, and highly transparent communications between the CTM Project team, the project managers, and the HPES team is at the center of a successful partnership.

We will address this early in the project by implementing a communications plan that provides multiple channels of communication between the project stakeholders. A robust communications plan will make sure that all project stakeholders are duly informed and consulted on all matters related to the project. Additionally, open channels of communication will be established between the project teams and the end users so that they are kept apprised of updates to the project status.

The HPES project manager will be responsible for working with the CTM's project manager to define this plan and make sure that it is executed throughout the project. The basic elements of the communications plan are outlined in the remainder of this section. The specific needs of other stakeholders will be identified during the planning process.

Communication will include structured status reports and communications that provide meaningful reports on project metrics that will clearly indicate the progress of the project as well as less formal communications among the project management team. The key benefit of this approach is to make sure that the needs are understood and that expectations are being met as well as to proactively identify and mitigate risks and project issues that develop before they impact the project.

The starting list of required project communications is below in Table 4.



Communication Title	Description	Frequency	Method of Delivery
Weekly Status Report	<p>A Microsoft Word 2013 format template to be prepared by the HPES PM during the project delivery that provides a status on the following sections:</p> <ul style="list-style-type: none"> • Updated GANTT chart, along with a copy of the corresponding Project Plan files (i.e., MS Project) • Status of currently planned tasks, specifically identifying tasks not on schedule and a resolution plan to return to the planned schedule; • Issues encountered, proposed resolutions, and actual resolutions; • Anticipated tasks to be completed in the next week • Task and Deliverable status • Proposed changes to the Project work breakdown structure and Project schedule, if any; • Planned absence of HPES staff and the expected return date; • Notification of any known staffing changes 	Bi-Weekly, provided one business day prior to Weekly Status Meeting	E-mail
Weekly Status Meetings	The HPES Project Team will attend weekly scheduled status meetings following an agreed agenda. HPES Project will communicate to CTM any known issues and or concerns that may impact the progress of the project. The weekly status report will serve as the basis for discussion.	Weekly	In person and/or conference bridge
Steering Committee Meeting	To provide project status to the management of both HPES and CTM with focus on executive summary status of the project. HPES anticipates this meeting to be less than one hour; attended by the HPES PM, HPES Account Manager, CTM Project Sponsor, the CTM PM and other stakeholders as designated by CTM Management.	Monthly	In-person and conference bridge

Table 4 - Project Management Communications

Standing meetings may follow a standard agenda, as in the following example:

- Review status reports
- Review actual versus planned progress
- Coordinating any upcoming meetings
- Discuss any outstanding issues that are not already being tracked
- Review open risks and modify risk management plan as needed
- Review open action items
- Announce activities planned for the next period.

Following each meeting, the HPES project manager will prepare and distribute minutes, including an action item list, persons responsible for each action, and a date due for each action item.



Change Management Process

The general change process will be implemented as illustrated in the following figure. Either HPES or CTM may initiate a change, in writing, to the Project. The change will be evaluated and any Project impact will be identified. If the evaluation of a change request submitted by CTM takes in excess of four (4) hours to complete, the cost of evaluation may be charged to CTM and any schedule slippage as a result of performing the evaluation will be documented as a formal change to the schedule. The price, scope, and schedule impact, if any, will be analyzed and documented. The change impact will then be processed for CTM authorization or closure.

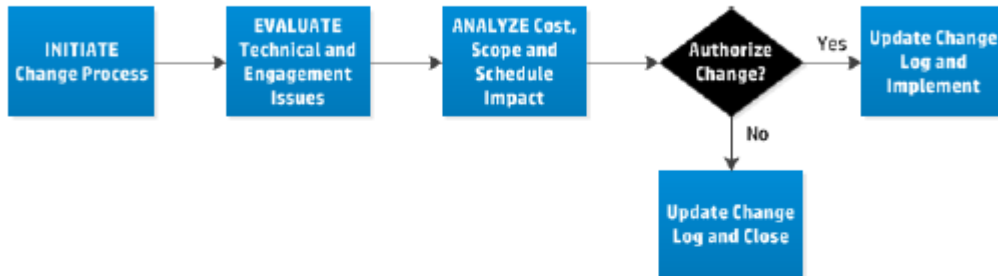


Figure 8 - Change Process Decision Matrix

The change request form will include a description of the change, reason for the change, and initiator of the change as well as impact to scope, price, quality, schedule, resources, and risks. All changes must be mutually agreed by the parties in writing. Once approved, changes to the initial project will be implemented as described.

If HPES and CTM are unable to resolve disposition of change order, the Project SOW will remain as defined in this document.

Project Management Tools

HPES will use the tools shown in Table 5 for project management and tracking.

Tool	Value	Description
MS Project 2013	Helps project manager be more productive to successfully complete the project	Project management software used for developing plans, assigning resources to tasks, tracking progress, managing budgets, and analyzing workloads
MS Office Suite 2013 – Excel, Visio, MS Word	Helps project manager to successfully complete PM deliverables	MS Office software used for developing project management-related deliverables

Table 5 - HPES Project Management Tools



2. Outline of capability to deliver the required services including process, functional, and technical expertise.

HPES's primary approach for the project to ensure the success of the Project is to use HP's proven framework and methodology (our "Programmatic Approach") for delivering Data Center Strategy ("DCS") engagements. This method will validate CTM's current Collocation Data Center Strategy and provide CTM with the information required to thoroughly understand the current and future state requirements for the Collocation data center framework.

HPES's delivery methodology will provide a comprehensive analysis of the current data center strategy and facilities environments; provide Space, Power and Cooling growth modeling; and will provide an integrated, right sized, and optimized supporting future state data center framework that meets COA Communications and Technology Management (CTM) Department's specific objectives. The outputs from this strategic engagement will allow CTM to move forward with a validated and deliberate Data Center Strategy that will enable swift decisions on the recommended direction for future state data centers.

The Data Center Strategy methodology integrates the following core City of Austin components to ensure that future state data center framework, facilities, and environments are right-sized and aligned with their specific objectives.

- **Business Profile** – business objectives, vision, strategy, and plans
- **Risk Profile** – risks tolerances, objectives, strategies, and plans
- **Technology Profile** – Applications, technology architecture/infrastructure strategies, frameworks, processes, and deployment plans
- **Data Center Profile** – data center model/topology and facilities environments

These four profiles represent the basic building blocks for developing today's future state data center strategies, with the outputs enabling integrated and right-sized solutions that provide much higher levels of scalability, availability, efficiency, predictability, and cost containment over time. The team has been utilizing this delivery framework for many years and it has been delivered successfully on behalf of a multitude of clients scattered across the globe. The outputs from these efforts will allow CTM to move forward the with relevant information required to adequately and professionally provide feedback to stakeholders and/or executive management teams, in order to provide a clear pathway for making intelligent and rational decisions as to the direction for current and/or future state data centers.



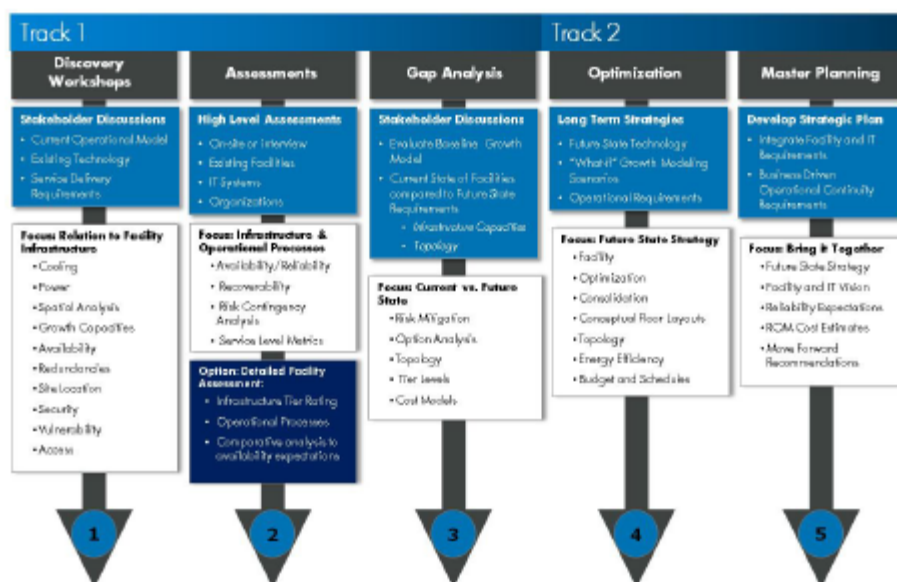


Figure 9 - HPES Data Center Strategy Process

The 5-step Data Center Strategy delivery process (outlined above) is a well-proven methodology that includes the following PRIMARY goals for this engagement:

- Review Business Profile for the supporting technology and DC facilities frameworks based around future state planning
- Review Risk Profile and tolerances from management, business units, and IT—including Business Impact Analysis (BIA), Disaster Recovery (DR), and Business Continuity Plan (BCP)
- Review Application Architecture and tiering
- Review Technology Architecture and Infrastructure strategies, requirements, and deployments
- Review current Data Center Framework and environments, including both production and DR sites
- Develop 10-year data center Space/Power/Cooling growth profile based on current and/or planned technology inventories to understand overall data center space/power/cooling footprint requirements
- Develop future state data center What-If scenarios (best case, worst case) that are aligned with business, risks, and technology profiles.
- Develop future state Data Center Framework Options that include facilities Sourcing options; including retrofits, build, collocation, and/or outsourcing
- Develop high-level ROM (rough order of magnitude) Costs Projections for the recommended future state data center framework and sourcing options
- Develop Projected Timelines for implementing recommended data center framework and facilities sourcing options



- Utilize/provide HP best practices, strategies, and recommendations for moving forward with the future state data center framework and consolidation/transformation plans

The team will begin this engagement with a "Discovery Workshop"; where the team will work collaboratively to understand and document CTM's business, risks, technology, and data center profiles; in order to develop a future state data center strategy.

The team will collaborate via meetings/discussions with relevant CTM and COA personnel; in order to complete data gathering, reviews, assessments, analysis, and modeling efforts required to develop an integrated and right-sized future state data center framework.

Inventory Process Method

HPES uses a 4-step process to deliver the required inventory services as outlined below:

Step 1: Understand – This step includes the kickoff meeting; data requirements and confirmation of availability; the project's data gathering tools and templates; data collection briefing session; confirmation of project scope, IT alignment with the critical success factors/evaluation criteria, potential areas for replacement criteria and potential areas for assigning tiers related to the applications. This phase will focus on working with City of Austin stakeholders and subject matter experts to understand and agree on the scope, approach, their responsibilities and the project's deliverables and schedule.

Step 2: Collect – This step includes guiding the City of Austin system and applications technical experts in the collecting and review of the necessary application information. The goals of this process include identifying what systems there are, which applications run on which hardware, how much hardware is involved with the applications for licensing considerations, how many database instances are involved, identifying if any technical issues such as load balancing will affect the move, dealing with specific hardware issues like data location or specific hardware requirements and how the applications are related, or dependent, on one another. The key output will be an application system inventory that is current, consolidated and validated across the applications portfolio and provides the necessary hardware information for planning.

Step 3: Analyze – This step reviews the data collected by the City of Austin personnel to map key mission/business functions; identify technology concern areas such as unsupported operating systems or obsolete vendor software, to examine equipment maintenance factors and generally gather the information required to both group systems into move groups while grouping applications into tiers for moving based on agreed upon business criteria. For example, the City of Austin may choose to group all applications that fall under a certain CPU platform, or have the highest dollar cost, or that have the most stringent uptime considerations, or use the most current technology. However the Tier groupings occur, this step uses the previously collected data to start building the move strategy.



Application Grouping Criteria

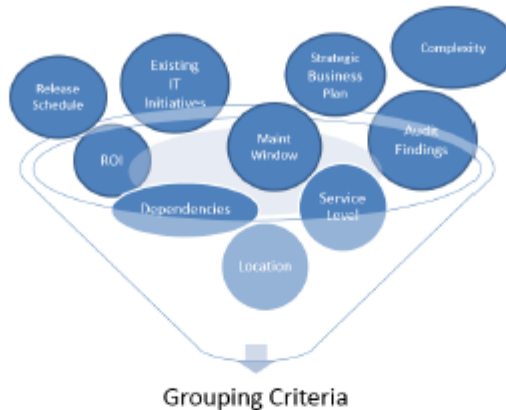


Figure 10 - Applications Grouping Criteria

HPES will deliver an indicative baseline output to summarize the “Current State” environment for the application and supporting infrastructure portfolio. The City of Austin will see the “owners” and “users” of each application, graphical depiction of key data interfaces across the portfolio, and a high-level assessment of technology gaps for further City consideration. The final output is a summary of the application dependences and constraints that will help to determine the impact of moving each particular application on other applications, data interfaces and systems. Where applicable infrastructure constraints will be noted also.

Step 4: Plan – This step organizes the roadmap activities and schedule based on business cases, logical sequencing, resource availability and funding, and proposes an overall governance structure to keep this important process on track. Additionally, indicative system costs related to the one-time and on-going benefits of the move strategy will be assessed for the relocation roadmap for the target environment.



Creating the Migration Strategy

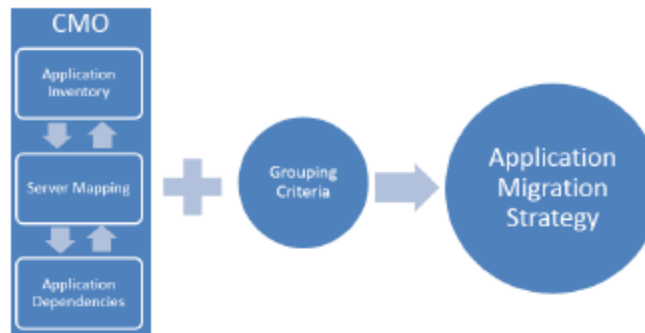


Figure 11 - HPES Application Migration Strategy Process

HPES will use the current state baseline data from Steps 2 and 3 to evaluate the dependence of each application relative to other applications across the portfolio. A further drill down reviews each application from a business value, technical alignment, risk, dependency, data usage, and on-going cost perspective. HPES will perform an analysis in the areas of business processes, interfaces, technical platform, application defects, labor skills, operating costs/other financials, data quality and indicative risk/return forecasts to map the best overall application move strategy for the City of Austin.

3. Provide a brief overview of your most relevant engagements. Include the customer names and contact information, scope of work, time line and deliverables. Also include number of Contractor staff assigned, number of customer staff assigned, if engagement was completed on time and/or within budget and if any changes to scope were needed.

HPES would like to present the following five engagements as examples of some of our most significant engagements. HPES respects the sensitivity of customer information relating to previous engagements. As a result, depending on the customer contract terms, HPES may not be able to release customer contact names and contact information at the proposal stage. HPES will be glad to provide customer contact information for all proposed services if HPES becomes a finalist for this contract.

The projects listed in this section were delivered by either HP Enterprise Services or by HP EYP Mission Critical Facilities, Inc., a wholly-owned subsidiary of HP. HP/EYP MCF is also working with HP Enterprise Services in delivering the proposed services under Phase 1 of this RFP.



Client 1: University of Utah	
Contact Name: Dan Bowden	Phone Number: (801) 213-3397
Scope of Work: Data Center Consolidation and Relocation This was a data center consolidation effort with planning and actual relocation. The effort was the culmination of six move events encompassing equipment from three existing data centers. All of the equipment is now housed in a newly built and commissioned data center. The HP team provided the move plan during the first engagement that started 13 months ago, and then provided the ongoing support and plan modifications through execution for the moves working with relocations teams and their subcontractors, including other system vendors, for the delivery. - Delivered by HP Enterprise Services	
Timeline: <ul style="list-style-type: none"> Started September 2011 Inventory completed November 2011 Move plan completed May 2012 Move completed October 2012 	
Deliverables: Inventory, Move plan, Move process, Move management complete with actual moves by truck, electronic methods, failovers, etc.	
Number of HPES Resources Assigned: Core team was 3 with resources as needed	Number of Customer Staff Assigned: Varied as DC environment had working Hospital and complete University business environment
Engagement completed on time/within budget? Yes	Scope Changes Required? Changes to number of data centers (some added) other minor items.

Client 2: Eisenhower Medical Center	
Contact Name: Andrew Hendrian	Phone Number: 760.340.3911 x 5901
Scope of Work: Data Center Relocation planning, inventory, and migration	
Timeline: 1/1/2009 – 4/1/2010	
Deliverables: <ul style="list-style-type: none"> Complete inventory of information systems (IS) infrastructure and dependencies provides foundation for move plan Architecture modifications resulting in greater performance, efficient management, and flexibility Move of nearly 400 servers Rationalization and Migration of 280 applications Standardized reliable power, cooling, and networking infrastructure End-to-end, integrated migration plan - Delivered by HP Enterprise Services	



Client 2: Eisenhower Medical Center	
Number of HPES Resources Assigned: Primary team of 4 (project manager, infrastructure technical architect, applications technical architect, and data center facilities engineer)	Number of Customer Staff Assigned: Primary team of 3 (IT Director, 2 associates)
Engagement completed on time/within budget? Yes, the data center migration completed on schedule and within budget without disruption to critical clinical and business applications.	Scope Changes Required? Yes, as part of the original scope, HPES performed a comprehensive analysis of all aspects of the existing data center's infrastructure. During this analysis, HPES was able to discover issues with the hospital's SAN infrastructure that needed to be dealt with prior to the move. Since the data center had been built piece-by-piece over a period of many years, it was discovered that the SANs were based on multiple switch technologies and were unaware of each other. The differing architectures increased the administrative burden and did not allow for data to move from one SAN to another. HPES designed a more enterprise-aware SAN fabric, along with developing SAN standards and a strategy that would better serve the hospital's future needs.

Client 3: Oklahoma Supreme Court	
Contact Name: Ronnie Nunn	Phone Number: 405.522.4773
Scope of Work: Data Center Relocation	
Timeline: 5/1/2010 – 7/2/2010	
Deliverables: <ul style="list-style-type: none"> • Data center relocation • Application Migration • Project/Program Management • Testing and Quality Assurance <p style="text-align: right;">- Delivered by HP Enterprise Services</p>	
Number of HPES Resources Assigned: Primary team of 3 (project manager, infrastructure architect, applications architect)	Number of Customer Staff Assigned: Primary team of one project manager and other staff added as necessary
Engagement completed on time/within budget? Yes, The move itself was broken into the following phases: <ul style="list-style-type: none"> • Planning • Pre-move • Move 	Scope Changes Required? No scope changes required.



Client 3: Oklahoma Supreme Court	
<ul style="list-style-type: none"> • Verification <p>The team worked closely with Court staff to validate all data migrations and hardware configurations. It was this close working relationship that allowed the project to be completed within the allotted time and budget.</p>	

Client 4: Ford Motor Company	
Contact Name: Kevin Sanders, HP Managing Principal	Phone Number: Furnished upon request
Scope of Work: <p>The Ford Motor Company (Ford) is the second-largest largest US-based automaker and the fifth largest in the world. While manufacturing Ford and Lincoln cars it holds the 10th position on the Fortune 100 list with revenues of \$134.3B, earned with ~213K employees in ~90 locations WW. Ford currently operates two enterprise data centers (EDC) in the US having accomplished an HP-like consolidation 2008-11 as a result of a 2007 HP-led data center consolidation strategy engagement. HP/EYP MCF was engaged to analyze Ford's world-wide IT enterprise and produce a strategy for consolidation to bring efficiencies in IT organization, infrastructure, and operations, resulting in unified control and cost savings.</p> <p>The project involved the study of several hundred thousand square feet of raised floor across data centers world-wide and the analysis of the contained IT to consolidate into the 80,000 square feet of U.S. transformed metro-pair enterprise data centers.</p> <p>- Delivered by HP EYP Mission Critical Facilities, Inc., a wholly-owned subsidiary of HP</p>	
Timeline: 2011	
Deliverables: Data Center Strategic Roadmap and Long-Term IT Growth Strategy	
Number of HPES Resources Assigned: 6	Number of Customer Staff Assigned: 4
Engagement completed on time/within budget? Yes	Scope Changes Required? Customer asked for an increase in scope and Consulting responsibilities to include additional studies for CIO and Board.



Client 5: National Institutes of Health	
Contact Name: Confidential Federal Government Client - Furnished Upon Request	Phone Number: Confidential Federal Government Client - Furnished Upon Request
<p>Scope of Work:</p> <p>Data Center Roadmap Project</p> <p>Rocky Mountain Laboratory, Hamilton, Montana</p> <p>The General Services Administration (GSA) engaged Management Business Solutions, LLC (MBS) and HP/EYP MCF to deliver a Cyber Study for the Rocky Mountain Laboratory division of the National Institute of Allergy and Infectious Diseases (NIAID), a division of the National Institutes of Health (NIH). MBS sub-contracted HP/EYP MCF to deliver its Data Center Roadmap service that provides the desired results of the defined Cyber Study.</p> <p>The primary goal of the Cyber Study - Consolidate multiple server rooms into single cost effective data center environment.</p> <p>This engagement and resulting recommendation was a collaborative effort between MBS, HP Critical Facilities Services (HP CFS) and stakeholders from Rocky Mountain Labs (RML) IT Division.</p> <p>Key Objectives and Outcomes:</p> <ul style="list-style-type: none"> • Flexible and scalable IT infrastructure to support unpredictable computational and storage growth • Adhere to NIH best practices • Mirror industry best practices • Minimize operating costs • Develop multi-tiered storage strategy that aligns to unique data flows • Quality end user experience • Accommodate growth for next 10 years • Recommendations to perform Data Center Consolidation of 3 on-site Data Centers including Optimization and Expansion to extend life of existing data center <p>- Delivered by HP EYP Mission Critical Facilities, Inc., a wholly-owned subsidiary of HP</p>	
<p>Timeline:</p> <p>2012: Data Center Strategic Roadmap and Long-Term IT Growth Strategy</p> <p>2013-2014: Phase II NIH/NIAID Fisher Lane, Bethesda, Maryland Location</p>	
<p>Deliverables:</p> <p>Data Center Strategic Roadmap and Long-Term IT Growth Strategy</p>	
Number of HPES Resources Assigned: 6	Number of Customer Staff Assigned: 3
Engagement completed on time/within budget? Yes	<p>Scope Changes Required?</p> <p>Yes, Scope increased to Add Phase II NIH/NIAID Fisher's Lane Bethesda, Maryland Location:</p> <p>Scope included MEP Engineering Peer Review of Engineering Design, Construction Oversight, Commissioning and Writing Data Center Operational Procedure Manuals.</p>



4. Describe your process for capturing and delivering best practices to your customers.

Best practices are a method or technique that has consistently shown results superior to those achieved with other means, and that is used as a benchmark. In addition, a "best" practice can evolve to become better as improvements are discovered. Best practice is considered by some as a business buzzword, used to describe the process of developing and following a standard way of doing things that multiple organizations can use.

HP as a consulting firm utilizes methods from various business models to capture best practices. PMI lessoned learned, ITIL knowledge capture, and even our own knowledge from both all of our customer projects and internal projects are captured and validated as to 'best' practice usage. HP uses industry standard best practices supplied by Organizations like IEEE, BOMI, VMware, and the Disaster Recovery Institute, to name a few.

HP continually captures these best practices, applies them to our processes and services as appropriate and our consultants and products apply them as appropriate.

Sometimes a "best practice" is not applicable or is inappropriate for a particular organization's needs. A key strategic talent required when applying best practice to organizations is the ability to balance the unique qualities of an organization with the practices that it has in common with others and this is key to HP's model of delivery.

5. List in order the distinct steps and or components of your requirements gathering process (for example focus groups or surveys).

HPES will provide Services related to the following activities:

HPES Inventory Data Gathering Process

Inventory consists of both physical inventory and application data gathering. The two data environments are integrated. However both have some portions that are unique. Applications require more analysis to determine the end result for tiering for instance, while the physical inventory needs to provide data that can assist in both moving strategies and replacement needs.

Both inventories will utilize a training method to enable the City of Austin to leverage manpower and time thus saving funding dollars and yet complete a detailed inventory that can be managed via change management to be a poor man's CMDB. This provides a means for the City of Austin to manage the inventory after completion but before the City is actually moving the environment. An example is when the City acquires the new facility.

Below we will break out the inventory methods to show the specific details for each type, but note that they will be managed together and share process steps as necessary. An attempt will be made to show the unique areas for each.

The proposed method starts with providing the City with preliminary information followed shortly by pre-data gathering via an onsite Kickoff meeting. Via a face-to-face meeting with the City of Austin HPES will determine the proper naming conventions, validation of scope both for the actual space and items to be included. It will allow for questions from the City to be answered and for the City to assign appropriate contacts for information and access. Also a floor plan of the current Data Center will be created.

The process is phased to capture initial details first. This allows for providing information for the Data Center design process. Via meetings/discussions with the customer, scope decisions are made. Further information about the system is obtained from either the customer or via mapping



information from the Apps teams. Critical changes in the data are provided to all members of the HPES team.

Expected outcomes from the meeting are:

- Known nomenclature such as naming conventions, rack/row designations, group names, general application structure, etc.
- Agreement to the planned inventory schedule
- Adjustment to the inventory process as necessary (including data capture tools)
- Assigned individuals for contact information
- Floor plan for inventory process. This is primarily for physical inventory usage. This document is limited 1 Visio page

Inventory Process

Then the actual inventories (application and physical) can be started using this information. It is expected that the City of Austin will utilize city staff to conduct the actual inventory over time. HPES will provide the city with necessary training tools and oversight to allow for complete inventory capture. HPES believes this is the best method for the City to gain knowledge, build business processes and understand the environment so as to make better business decisions with HPES for facility selection and move planning both for Phase 1 and future phases.

HPES expects the City to assign appropriate resources to the tasks and to work with HPES during planned oversight meetings to generate the data in roughly two months. This is again in line with the general timeline the City is using to complete the Phase 1 process.

Physical Inventory Method

HPES will supply an Inventory method that utilizes an existing HPES process customized for this engagement based on adding in specific application details and from data/decisions from the Kick Off meeting. A Data Capture process and tools will be provided to the City team and training from the HPES staff will allow for the City of Austin team to have firsthand understanding of how to complete the work. The HPES Team will work with the City on a single rack in the current Data Center to make sure that the City has understood the method and can utilize the tools.

HPES will then utilize scheduled meetings with the City of Austin inventory team to facilitate or provide oversight into the inventory. Questions can be answered, tools can be updated as necessary and tracking of the completion can be monitored to make sure that the inventory provides the necessary data to the City of Austin Phase 1 process in a timely manner.

The Floor Plan developed earlier will be the basis for the physical inventory and necessary items like barcodes (unique identifiers – could be asset tags) would have been agreed to at the Kick off meeting.

Application Inventory Method

The diagram below highlights the HPES standard approach to guiding City of Austin staff in the collection of information needed to build the application move roadmap. HPES will provide the required spreadsheets to the City of Austin personnel and work with them during the first week of the project to develop the necessary understanding they need to correctly document the application data. From that point forward, it is expected that City of Austin personnel will document the application data across a period of weeks and forward that information to the



HPES consultant for analysis and development of the application move roadmap. Weekly meetings will be held to document progress to the project plan.

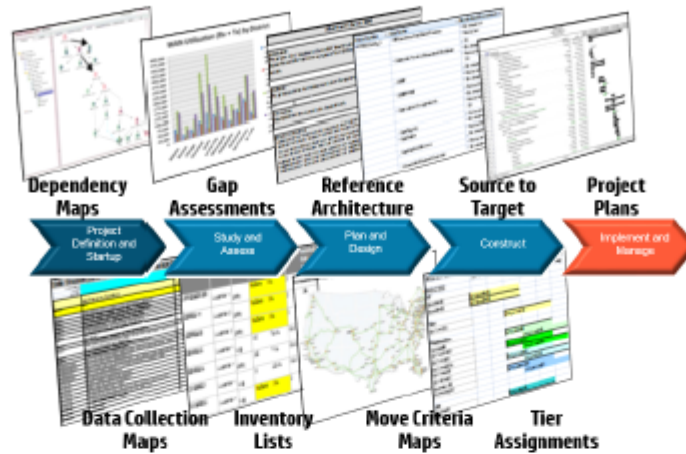


Figure 12 - HPES Application Inventory Move Data Gathering

Inventory Training

As noted above HPES will conduct inventory training. It is expected that this will consist of a meeting with the City of Austin inventory staff or designated trainer to provide information on method and tools being used to capture the data. Inventory is expected to capture information such as noted in Table 2.

And portions of the information are then translated into Rack Diagrams that are then used with the Photos taken during inventory to assess any issues, deal with any questions, and can be used to further plan in Phase 2.

HPES will provide a way to capture the data and document the rack elevation. It is expected that the City of Austin team will provide any tags (barcodes, asset or other unique identifiers) for each item, all necessary change control to manage the inventory rack by rack both during and after the inventory. And it is expected that the City will provide a means to capture the photos needed for the inventory.

Inventory Oversight

As the data is captured, entered into the system, rack elevations updated, and changes managed HPES will work with CTM to provide oversight and assistance to complete the inventory.

Having utilized non-HPES personnel and dealt with other inventories before, HPES believes that this method will provide a complete inventory while still saving the City of Austin costs. Key to this success is a method that has been used before and works.

HPES will conduct weekly oversight sessions where the current data updates will be reviewed by HPES before the meetings and then with HPES assistance any issues or questions will be addressed. Typically this process is more about focus and consistency and most issues are



easily solved. Generally, they require an agreed upon decision where no or inconsistent data is available and oversight meetings can provide that.

Currently 8 oversight weekly meetings are planned as the expected completion of the inventory should not take more than two months by our estimate. We are using the assumption that there are less than 1,000 line items in the inventory. These are the 550 Windows servers, 50 Linux servers, and 70 AIX LPARs provided in Addendum 3. There would appear to be other items such as network devices, storage devices and unknowns that need to be inventoried also. Another assumption is that Virtual Devices (i.e., servers that are virtualized) are included in the total assumption.

At the end of the inventory the data receives one more final validation and sign off from the City of Austin and is provided to the Facility team to use in scoping the size and shape necessary for the move.

However, the data is assumed not to be stagnant at that time. Changes will occur and the data needs to be updated each time and expectation is that the City of Austin being trained and having completed the inventory can continue to update it via change control as necessary until the next phase in the process.

Track-1 Stakeholder Meeting/Discussion

The team will collaborate via meetings/discussions with relevant CTM and COA personnel; in order to complete data gathering, reviews, assessments, analysis, and modeling efforts required to develop an integrated and right-sized future state collocation data center framework.

Discovery Workshops including Business Model/Vision Review, Risks Profile Review, Technology Systems/Applications Review, Technology Growth Profile, and Data Center Framework Review/Analysis, IT Systems Inventory and Application inventory and discovery.

The team will schedule, coordinate, and manage the kick-off workshop between the HP team and the CTM team and will also forward a data gathering packet to the CTM team, in order to start data gathering efforts prior to the actual kick-off workshop date/time.

Track-1 Objectives

1. High-level review of business model, vision, and current and/or planned strategies
2. High-level review of any existing IT and/or data center consolidation/transformation strategies/plans
3. Interview CTM stakeholders and translate feedback into an understanding of business operational objectives, risks objectives/strategies/plans, technology profiles, growth models, and current data center facilities requirements
4. High-level review of risks objectives (i.e., availability, reliability, and continuance objectives/requirements)
5. High-level review of existing Business Impact Analysis (BIA), Disaster Recovery Planning (DRP), and/or Business Continuity Planning (BCP) documentation/requirements
6. Stakeholder input, with respect to current and/or planned Recovery Point Objectives (RPO) and Recovery Time Objectives (RTO), with respect to production IT systems/applications
7. High-level review of CTM risk tolerances, with respect to production IT systems/applications, recovery strategies, plans, and current and/or planned strategies



for implementing applications high-availability and/or data replication techniques (synchronous/asynchronous)

8. Guide the Preparation of a detailed Data Center applications, systems, and networks inventory
9. High-level review of baseline technology profile from HP experience and stakeholder input
10. Stakeholder input and reviews regarding existing technology environments (i.e., IT/Network, Mainframe, Wintel, UNIX, Storage, Tape, Telephony, etc.), as well as designs and deployment standards/methodologies
11. Technology growth modeling to rationalize data center space/power/cooling requirements over a 10-year period
12. Enable collaborative consulting to address possible gaps in future state business, technology, and risks metrics/drivers that may impact the future state of CTM's capabilities across the future state data center framework
13. Checkpoint-1 Presentation outlining Track-1 findings and initial technology growth modeling outputs

Replacement Modeling

HPES will take the inventory data and perform analysis based on data supplied by the City of Austin either during the actual inventory or after we have agreed upon the final inventory and the City has provided the required information.

Required data:

- Support contracts
- SLAs
- Warranty information

These data items may cover groupings of systems, specific servers or business application environments. This is part of what will need to be covered in some detail in the Kickoff meeting. Then this can be either captured as needed for individual servers, add in after the inventory based on type of server, vendor of device, or even application owner as examples. Then HPES will utilize this to provide guidance in the form of a document to the City. This document would not be a specific server by server replacement. It would be a guide to replacement based on general information. This information would include application information as appropriate and general guidance from HPES. It will not be a parts catalog as HPES cannot dictate what Hardware the City should use especially since HPES expects to bid on future Phases of this engagement with the City.

Also, during the life of this project technology will most likely change both in the physical and software environments. It is not possible in a several year process to predict what will be the best solution, except to provide guidelines.



Track-2 – Future State Data Center Planning

The team will transition from Track 1 into Track 2; where the team will continue to work collaboratively to incorporate data gathered and vetted in Track 1 to develop a “right sized” future state model incorporating understood CTM’s business, risks, technology, and data center profiles; in order to develop a future state data center roadmap.

The team will continue to collaborate via meetings/discussions with relevant CTM and COA personnel; in order to complete data gathering, reviews, assessments, analysis, and modeling efforts required to develop an integrated and right-sized future state data center framework.

HPES will provide conceptual future state data center planning/modeling services as follows:

1. Conceptual future state data center options to meet CTM business, risks, and technology strategies/plans
2. “What-if” data center options/scenarios based on CTM provided business, risks, and technology strategies/plans
 - Potential recommendations for consolidation of existing data center framework and facilities
 - Suitability for existing data centers to fit within the CTM’s future state data center framework
 - Potential current state retrofit options based around existing data center sites (based on CTM provided input for specific data center environments, infrastructures, issues, gaps, etc.)
 - High-level conceptual data center layouts for future state data center framework and white space (i.e. machine space) layouts
 - Potential data center sourcing options (i.e., build, collocation, outsource)
 - ROM (rough order of magnitude) costs for data center options
 - High-level future state data center framework transition strategy/plan
3. Future state technology infrastructure recommendations and planning criteria based on enhanced future state data center capabilities (this engagement will help communicate with CTM executives through documentation, conceptual drawings, and pictures of the current state of the CTM data center framework, as well as HP strategies/options/ recommendations for the recommended future state data center framework)
4. Determine replacement items and their associated costs. Align technology refresh cycles with relocation schedule. Include any swing gear and associated costs (if required)
5. Checkpoint-2 presentation outlining track-2 findings and potential future state data center framework and facilities sourcing options
6. Develop consolidation/transformation transition strategy/plan



Following the Completion of Track 1 and Track 2 of this Engagement, CTM will Possess:

- Deliberate and detailed information required to move forward with key management decisions as to the direction of the future state collocation data center framework.
- A thorough and comprehensive review and assessment of the current state data center model, framework, and facilities environments
- A detailed growth modeling profile that depicts data center space/power/cooling projections over the next 10 years
- HP's validation of the future state data center framework; number of data center sites/locations; operational tier level, types, and sizes for the proposed collocation data center facilities; recommended distances between sites; location, etc.
- Responses to critical future state Collocation Data Center framework questions that provide answers to the how, what, and when questions; as well as "why" to move forward with the recommended future state Data Center Strategy
- An understanding of the anticipated ROM CAPEX and OPEX costs associated with the recommended future state data center framework and facilities sourcing options
- Anticipated timelines to transition to the recommended future state data center framework
- An integrated future state data center roadmap that is right-sized within specific CTM business, risks, technology, and facilities strategies, objectives, and requirements
- Develop and collaboratively approve the RFP template

Track 3 - Data Center Financial Analysis

HP will gather the relevant financial information in order to provide CTM with details to the financial impact of the proposed recommendations. The intent of the financial analysis is to highlight data center strategy options and to provide justification for the required investment. This track is integrated into the Data Center Strategy process and works in a parallel/combined work stream. The deliverables will be combined into one document for final delivery.

- HP will prepare a high-level financial analysis using CTM or HP Business Case Template, as designated by CTM. The template must align very closely with the Deliverable that is typically produced from HP's financial business case methodology.
- The Deliverable will consist of financial analyses of the proposed collocation scenario. The goal of HP's methodology is to understand the financial impact that HP's proposed solutions will have on The City of Austin operating costs, while estimating the required capital investment. HP will perform the necessary steps to support the assumptions that will be required to estimate the financial impact analysis. **Scenarios (up to 3)** are analyzed individually for their required investment, financial impact, business and strategic benefits. The financial analysis for each scenario are consolidated into a single summary financial analysis to highlight:
 - Overall estimated Opex and Capex impact
 - Cash flow impact
 - Investment justification including
 - Total Cost of Ownership (TCO)



- Return on Investment (ROI)
- Break-Even Point Analysis (BEP)
- Net Present Value (NPV)

The Financial Impact Analysis will highlight data center strategy option and provide justification for the required investment.

- The financial analysis helps assess the cost of The City of Austin current IT infrastructure and is used to compare and contrast different infrastructure investments. It considers all of the costs of purchasing and owning an asset throughout its useful life. The analysis is considered Rough Order of Magnitude (ROM) pricing and is meant for planning and communication of the recommendations to the executives only. The lifecycle costs typically include direct "hard" costs, such as:
 - Facilities (building and related infrastructure)
 - Other Facilities Costs (insurance, maintenance, etc.)
 - Hardware depreciation and/or lease costs
 - Support and maintenance contracts
 - Network
 - Power
 - Staffing
 - Migration

If desired, the analysis will assess indirect "soft" costs of ownership such as the impact of downtime from security breaches and unplanned outages. Typically, the analysis is conducted over a five to ten year analysis period, reflecting the typical useful life of the asset and depreciation policies.

In addition to the comparative costs, HP and the City of Austin can collaboratively rank the effectiveness of each of the scenarios against operational, growth, and architecture goals.

Phase 1 Deliverables

1. Guide Asset Inventory (Physical and Applications)

Spreadsheet information supplying the City of Austin with the Data Center inventory using the basis of information depicted in Table 2. The information will be customized for the City of Austin and will include application information and provide a virtual CMDB for the Data Center.

The information may be contained in one or more spreadsheets, will be defined by the floor plan as to scope and location. The spreadsheet information will also be reported in Rack elevations by taking partial data from the spreadsheets and presenting it in the Rack elevations.

A change process will be discussed with the City of Austin to allow to utilize the guided method to manage the state of the Data Center beyond Phase 1.

2. Replacement modeling guidelines

Word document describing guidelines for the City of Austin inventoried environment as to potential replacement strategies as necessary for inclusion into the new Data Center. Provide guidelines, direction and other information such as Refresh Cycle, buying process, and funding guidelines as necessary to support captured inventory data both physical and



applications. This document does not include direct parts lists for replacement of systems. This document is approx. 20 pages in Microsoft Word.

3. Data center future state conceptual master planning document.

The conceptual master planning document comply with the document requirements in the RFP:

- **Strategic Plan**
 - *Executive Summary* clearly stating the objectives and abbreviated findings/recommendations derived from the Data Center Strategy engagement
 - *Current State* outlining the following:
 - Business Model/Strategy/Vision
 - Risks profile
 - Risks objectives, strategies, capabilities, requirements, and documented plans
 - Current Production and/or DR data center framework
 - Current Technology strategies/requirements
 - Recommended Optimized future state data center planning scenario(s) that include the following attributes:
 - Comparison of costs, risks, and business benefits.
 - Governing Business drivers utilized during this process.
 - Alignment to discovered disaster recovery requirements.
 - High level network requirements.
 - Impact to facility focused operations and infrastructure.
 - Summary of how the recommended future state planning scenarios were derived.
 - HP experience and best practices based recommendations.
 - *Data center reliability requirements recommendations such as TIER level(s).*
 - *Conceptual future state roadmap.* Roadmap will include a transition plan for moving from the current state to the recommended future state(s). The roadmap will contain major milestone timelines and major work efforts required to complete the consolidation.
 - *Future state technology infrastructure recommendations.*
- **Business Case** - Executive level business case development for proceeding with the recommended data center project providing the following attributes:
 - Summary of current state of data center environment addressing gaps/limitations, risks, and business drivers for consolidation.
 - Description Collocation options that were evaluated highlighting costs, risks, and benefits.
 - Business requirements based need to provide new and/or enhanced data center infrastructure capabilities.
 - Data center infrastructure sizing requirements and associated rough order of magnitude cost associated with a collocation facility that meets business driver requirements discovered during the discovery workshop.
 - Financial analysis comparing and evaluating current costs vs. rough order of magnitude costs for collocation data center model and/or sourcing options.



- Highlights conceptual roadmap that summarizes transition to the recommended data center model.
- Intent to answer the question "Why do we need to proceed with this recommended data center strategy?"
- **Facilities Selection Process (Scope for Phase 2 RFP)** - Create scope for formal RFP document – issued electronically

6. Propose a time line for a project of this scope

Figure 13 below shows HPES' high level Phase 1 project timeline:

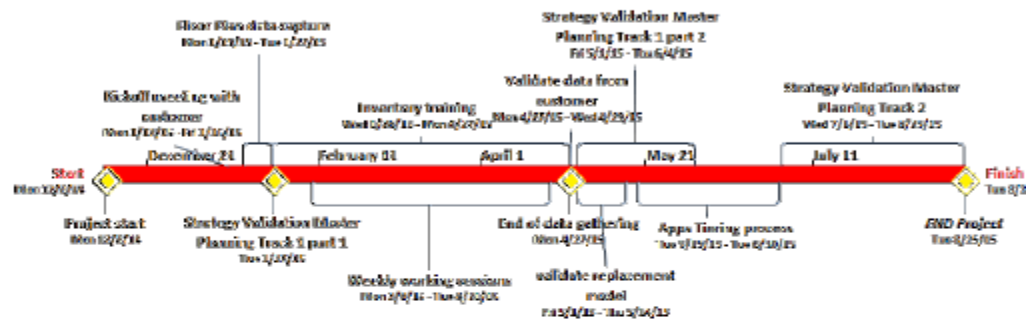


Figure 13 - Proposed Phase 1 Project Timeline



Tab 6 - Implementation/Deliverables Plan

Describe your implementation plan and schedule for accomplishing the required work.

1. The technical factors that will be considered and the depth to which each will be treated.

The list below illustrates the technical depth required for building the application move roadmap and is indicative of the information required for this exercise.

- Application functionality description
- Business and technical owners
- Upstream and downstream interfaces
- Type of application – Off-the-shelf or homegrown?
 - For off-the-shelf packages: vendor, version number, maintenance and license agreement information
 - For homegrown applications: programming language, 3rd party utility usage
- Operating system used and version number
- CPU platform
- Database used
- Server name, description, and IP address for application
- Server name, description, and IP address for data
- Number of users
- Business impact if the application is shut down for a period of time
- Length of acceptable down time
- Known technical considerations, such as load balancers in use

2. The degree of definition provided in each technical element of your Implementation Plan.

HPES' implementation plan contains steps that provide a high degree of definition. They provide the COA with key elements, the steps within those key elements, and end states from those steps.

3. The points at which written, deliverable reports will be provided.

The Project Schedule has been summarized at a high level in Table 6 below and as a Timeline in Tab 5, Item #6.

Deliverable Name	Estimated Delivery Date (Month) Based on Preliminary Project Plan
Guide Asset Inventory (Physical and Applications)	Month 4
Replacement Items	Month 5
Strategic Plan	Month 8
Business Case	Month 8
Facilities Selection Process (Scoop for Phase 2 RFP)	Month 8

Table 6 - Table of Deliverables with Estimated Delivery Dates



Document Review Process

If HPES provides documentation as part of the Project, each document outcome will initially be developed in draft form. The HPES Project Manager/Lead Consultant and CTM Project Manager may schedule working sessions, inclusive of HPES and/or CTM personnel, to refine the draft document as it is written.

When the draft document is complete, the HPES Project Manager/Lead Consultant will submit the initial release document to the CTM Project Manager for review. The CTM Project Manager will be responsible for distributing copies of the initial release document for internal review. The CTM Project Manager is responsible for consolidating CTM comments and for providing a clearly marked version of the draft document to HPES' Project Manager/Lead Consultant. The CTM Project Manager will have three (3) working days to review and return the consolidated comments to the HP Project Manager/Lead Consultant, unless otherwise agreed to by the parties. If no revisions are received within the three-day timeframe, the document will be considered accepted. HPES will review and evaluate CTM comments and respond to them in writing within three (3) working days. CTM comments and HPES recommendations will be discussed and integrated within three (3) working days into a final version and delivered to the CTM Project Manager. Delivery of the final version of a document will constitute CTM's acceptance of the document.

4. The amount of progress payments you are requesting upon successful completion of milestones or tasks

Milestone/Deliverable Name	Estimated Milestone Billing (% of Total Project Price)	Estimated Month of Billing, Based on Preliminary Project Plan
Kickoff Meeting Complete	5%	Month 1
Formal Project Plan Delivered	5%	Month 1
Start of IT Asset Inventory	10%	Month 2
IT Asset Inventory Collected	10%	Month 4
Strategic Workshop Complete	10%	Month 5
Applications Tiering Complete	10%	Month 6
Delivery of IT Inventory and Space, Power and Cooling Requirements	20%	Month 7
Final Validation and Business Case	20%	Month 8
Phase 2 RFP Creation	10%	Month 8

Table 7 - Table of Milestones/Deliverables with Estimated Progress Payments



Tab 7 - Required Responses

Deleted as per Section A. of Request for Proposal No. SMW0122, Addendum 3, dated October 7, 2014.

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Tab 8 - Authorized Negotiator

Include name, address, e-mail address, and telephone number of person in your organization authorized to negotiate Contract terms and render binding decisions on Contract matters.

The authorized negotiator for HPES is: **Douglas Mildram**

Address: HP Enterprise Services, LLC

165 Dascomb Road

Andover, MA 01810-5897

Email: douglas.bru.mildram@hp.com

Phone: Office: 978-474-2734 Mobile: 617-462-0362



Tab 9 - Exceptions

Be advised that exceptions to any portion of the Solicitation may jeopardize acceptance of the Proposal. The Proposer must clearly indicate each exception taken and indicate the alternative language along with the business need for the alternative language. The failure to identify exceptions or proposed changes with a full explanation will constitute acceptance by the Proposer of the Solicitation as proposed by the City. The City reserves the right to reject a Proposal containing exceptions, additions, qualifications or conditions not called for in the Solicitation.

HPES has provided exceptions to the Standard Purchase Terms and Conditions.

City of Austin Sections	HPES Response and Reason for Exception
Section 19 (Warranty-Price)	
<p>A. The Contractor warrants the prices quoted in the Offer are no higher than the Contractor's current prices on orders by others for like Deliverables under similar terms of purchase.</p> <p>C. In addition to any other remedy available, the City may deduct from any amounts owed to the Contractor, or otherwise recover, any amounts paid for items in excess of the Contractor's current prices on orders by others for like Deliverables under similar terms of purchase.</p>	<p>HP cannot agree to subsections 19 (A), 19 (C). Both must be deleted in their entirety and there is no alternative language. This exception is due to the fact this is a custom solution and there is no way to measure/perform against this standard.</p>
Section 31 (Indemnity)	
<p>B. THE CONTRACTOR SHALL DEFEND (AT THE OPTION OF THE CITY), INDEMNIFY, AND HOLD THE CITY, ITS SUCCESSORS, ASSIGNS, OFFICERS, EMPLOYEES AND ELECTED OFFICIALS HARMLESS FROM AND AGAINST ALL INDEMNIFIED CLAIMS DIRECTLY ARISING OUT OF, INCIDENT TO, CONCERNING OR RESULTING FROM THE FAULT OF THE CONTRACTOR, OR THE CONTRACTOR'S AGENTS, EMPLOYEES OR SUBCONTRACTORS, IN THE PERFORMANCE OF THE CONTRACTOR'S OBLIGATIONS UNDER THE CONTRACT. NOTHING HEREIN SHALL BE DEEMED TO LIMIT THE RIGHTS OF THE CITY OR THE CONTRACTOR (INCLUDING, BUT NOT LIMITED TO, THE RIGHT TO SEEK CONTRIBUTION) AGAINST ANY THIRD PARTY WHO MAY BE LIABLE FOR AN INDEMNIFIED CLAIM.</p>	<p>In subsection B, HP will be liable for "third party" claims.</p>



City of Austin Sections	HPES Response and Reason for Exception
Supplemental Purchase Provisions Section 3 (Insurance)	
<p>A. General Requirements</p> <p>ii. The Contractor shall not commence work until the required insurance is obtained and until such insurance has been reviewed by the City. Approval of insurance by the City shall not relieve or decrease the liability of the Contractor hereunder and shall not be construed to be a limitation of liability on the part of the Contractor.</p>	<p>ii. The Contractor shall not commence work until the required insurance is obtained provided and until such insurance has been reviewed by the City. Approval of insurance by the City shall not relieve or decrease the liability of the Contractor hereunder and shall not be construed to be a limitation of liability on the part of the Contractor.</p>
<p>B. Specific Coverage Requirements: The Contractor shall at a minimum carry insurance in the types and amounts indicated below for the duration of the Contract, including extension options and hold over periods, and during any warranty period. These insurance coverages are required minimums and are not intended to limit the responsibility or liability of the Contractor.</p>	<p>B. Specific Coverage Requirements: The Contractor shall at a minimum carry insurance in the types and amounts indicated below for the duration of the Contract, including extension options and hold over periods, and during any warranty period. These insurance coverages are required minimums and are not intended to limit the responsibility or liability of the Contractor.</p>
<p>B. Specific Coverage Requirements</p> <p>i. Worker's Compensation and Employers' Liability Insurance: (1) The Contractor's policy shall apply to the State of Texas and include these endorsements in favor of the City of Austin:</p> <p>ii. Commercial General Liability Insurance: (b) <i>Thirty (30) days Notice of Cancellation, Form WC420601, or equivalent coverage</i> (2) The policy shall also include these endorsements in favor of the City of Austin (b) <i>Thirty (30) days Notice of Cancellation, Endorsement CC 0205, or equivalent coverage</i></p> <p>iii. Business Automobile Liability Insurance: (1) The policy shall include these endorsements in favor of the City of Austin: (b) <i>Thirty (30) days Notice of Cancellation, Endorsement CA0244, or equivalent coverage</i></p>	<p>In Section 3 HP does not require their Insurer's to notify HP clients of insurance cancellations, but HP will endeavor to advise the client of any policy cancellation within a reasonable time.</p>
<p>ii. Commercial General Liability Insurance: The minimum bodily injury and property damage per occurrence are \$500,000 for coverages A (Bodily Injury and Property Damage) and B (Personal and Advertising Injury).</p>	<p>ii. Commercial General Liability Insurance: The minimum bodily injury and property damage per occurrence are \$500,000 for coverages A (Bodily Injury and Property Damage) and B (Personal and Advertising Injury).</p>
<p>iii. Business Automobile Liability Insurance: The Contractor shall provide coverage for allowed, non-owned and hired vehicles with a minimum combined single limit of \$500,000</p>	<p>iii. Business Automobile Liability Insurance: The Contractor shall provide coverage for allowed, non-owned and hired vehicles with a minimum combined single limit of \$500,000 per</p>



City of Austin Sections	HPES Response and Reason for Exception
per occurrence for bodily injury and property damage. Alternate acceptable limits are \$250,000bodily injury per person, \$500,000 bodily injury per occurrence and at least \$100,000 property damage liability per accident.	occurrence for bodily injury and property damage. Alternate acceptable limits are \$250,000bodily injury per person, \$500,000 bodily injury per occurrence and at least \$100,000 property damage liability per accident.
iv. Professional Liability Insurance: The Contractor shall provide coverage, at a minimum limit of \$1,000,000 per claim, to pay on behalf of the assured all sums which the assured shall become legally obligated to pay as damages by reason of any negligent act, error, or omission arising out of the performance of professional services under this Agreement. If coverage is written on a claims-made basis, the retroactive date shall be prior to or coincident with the date of the Contract and the certificate of insurance shall state that the coverage is claims-made and indicate the retroactive date. This coverage shall be continuous and will be provided for 24 months following the completion of the contract.	iv. Professional Liability Insurance: The Contractor shall provide coverage, at a minimum limit of \$1,000,000 per claim, to pay on behalf of the assured all sums which the assured shall become legally obligated to pay as damages by reason of any negligent act, error, or omission arising out of the performance of professional services under this Agreement. If coverage is written on a claims-made basis, the retroactive date shall be prior to or coincident with the date of the Contract and the certificate of insurance shall state that the coverage is claims-made and indicate the retroactive date. This coverage shall be continuous and will be provided for 24 12 months following the completion of the contract.
C. Endorsements: The specific insurance coverage endorsements specified above, or their equivalents must be provided. In the event that endorsements, which are the equivalent of the required coverage, are proposed to be substituted for the required coverage, copies of the equivalent endorsements must be provided for the City's review and approval.	C. Endorsements: The specific insurance coverage endorsements specified above, or their equivalents must be provided. In the event that endorsements, which are the equivalent of the required coverage, are proposed to be substituted for the required coverage, copies of the equivalent endorsements must be provided for the City's review and approval.

Requested Additions

HP requires the addition of Intellectual Property Rights and Limitation of Liability because HP i) there will be no transfer of IP under this contract and ii) HP must limit its liability to a level consistent with offering these services.

- **Add (Intellectual Property Rights)** -"No transfer of ownership of any intellectual property will occur under this Agreement. The City grants Contractor a non-exclusive, worldwide, royalty-free right and license to any intellectual property that is necessary for Contractor and its designees to perform the ordered services. If deliverables are created by Contractor specifically for The City and identified as such, Contractor hereby grants The City a worldwide, non-exclusive, fully paid, royalty-free license to reproduce and use copies of the deliverables internally."
- **Add (Limitation of Liability)** – "Contractor's liability to the State under this contract is limited to the greater of \$ 400,000 or the amount payable by The City to Contractor for the first 12 month period of the contract term. Neither The City nor Contractor will be



liable for lost revenues or profits, downtime costs, loss or damage to data or indirect, special or consequential costs or damages. This provision does not limit either party's liability for: unauthorized use of intellectual property, death or bodily injury caused by their negligence; acts of fraud; wilful repudiation of the Agreement; nor any liability which may not be excluded or limited by applicable law."



Appendix A - Example Datacenter Floor Plan



Section 0605: Local Business Presence Identification

A firm (Offeror or Subcontractor) is considered to have a Local Business Presence if the firm is headquartered in the Austin Corporate City Limits, or has a branch office located in the Austin Corporate City Limits in operation for the last five (5) years. The City defines headquarters as the administrative center where most of the important functions and full responsibility for managing and coordinating the business activities of the firm are located. The City defines branch office as a smaller, remotely located office that is separate from a firm's headquarters that offers the services requested and required under this solicitation.

OFFEROR MUST SUBMIT THE FOLLOWING INFORMATION FOR EACH LOCAL BUSINESS (INCLUDING THE OFFEROR, IF APPLICABLE) TO BE CONSIDERED FOR LOCAL PRESENCE.

NOTE: ALL FIRMS MUST BE IDENTIFIED ON THE MBE/WBE COMPLIANCE PLAN OR NO GOALS UTILIZATION PLAN, SECTION 0900 OF THE SOLICITATION.

USE ADDITIONAL PAGES AS NECESSARY

OFFEROR:

Name of Local Firm	HP Enterprise Services, LLC					
Physical Address	14231 Tandem Boulevard, Austin, TX 78728					
Is Firm located in the Corporate City Limits? (circle one)	<input checked="" type="radio"/> Yes			<input type="radio"/> No		
In business at this location for past 5 yrs?	<input checked="" type="radio"/> Yes			<input type="radio"/> No		
Location Type:	Headquarters	Yes	<input checked="" type="radio"/> No	Branch	<input checked="" type="radio"/> Yes	No

SUBCONTRACTOR(S):

Name of Local Firm						
Physical Address						
Is Firm located in the Corporate City Limits? (circle one)	Yes			No		
In business at this location for past 5 yrs?	Yes			No		
Location Type:	Headquarters	Yes	No	Branch	Yes	No

SUBCONTRACTOR(S):

Name of Local Firm						
Physical Address						
Is Firm located in the Corporate City Limits? (circle one)	Yes			No		
In business at this location for past 5 yrs?	Yes			No		
Location Type:	Headquarters	Yes	No	Branch	Yes	No

Solicitation No. RFP SMW0122

Section 0815: Living Wages and Benefits Contractor Certification

Company Name HP Enterprise Services, LLC

Pursuant to the Living Wages and Benefits provision (reference Section 0400, Supplemental Purchase Provisions) the Contractor is required to pay to all employees directly assigned to this City contract a minimum Living Wage equal to or greater than \$11.00 per hour.

I hereby certify under penalty of perjury that all of the below listed employees of the Contractor who are directly assigned to this contract are compensated at wage rates equal to or greater than \$11.00 per hour.

Employee Name	Employee Job Title
Carl Greer	Program Manager
Carroll "Tom" Wilson	Sr. Technology Consultant
Jeff Gum	Technology Consultant
Ado Ellzey	Business Consultant IV
Cliff Moore	Senior Consultant/Program Manager
Laura Cunningham	Business Consultant

USE ADDITIONAL PAGES AS NECESSARY

- (1) All future employees assigned to this Contract will be paid a minimum Living Wage equal to or greater than \$11.00 per hour.
- (2) Our firm will not retaliate against any employee claiming non-compliance with the Living Wage provision.

A Contractor who violates this Living Wage provision shall pay each employee affected the amount of the deficiency for each day the violation continues. Willful or repeated violations of the provision may result in termination of this Contract for Cause and subject the firm to possible suspension or debarment.

Section 0815: Living Wages and Benefits Contractor Certification

Company Name HP Enterprise Services, LLC

Pursuant to the Living Wages and Benefits provision (reference Section 0400, Supplemental Purchase Provisions) the Contractor is required to pay to all employees directly assigned to this City contract a minimum Living Wage equal to or greater than \$11.00 per hour.

I hereby certify under penalty of perjury that all of the below listed employees of the Contractor who are directly assigned to this contract are compensated at wage rates equal to or greater than \$11.00 per hour.

Employee Name	Employee Job Title
Brian Donabedian	Senior Consultant
Brad Blair	Senior Consultant
Sam Rizzo	Senior Consultant/Critical Facilities Consultant
Tao Tao	Senior Consultant/Data Center Transformation Consultant/Senior Solution Architect

USE ADDITIONAL PAGES AS NECESSARY

(1) All future employees assigned to this Contract will be paid a minimum Living Wage equal to or greater than \$11.00 per hour.

(2) Our firm will not retaliate against any employee claiming non-compliance with the Living Wage provision.

A Contractor who violates this Living Wage provision shall pay each employee affected the amount of the deficiency for each day the violation continues. Willful or repeated violations of the provision may result in termination of this Contract for Cause and subject the firm to possible suspension or debarment.

Section 0835: Non-Resident Bidder Provisions

Company Name HP Enterprise Services, LLC

- A. Bidder must answer the following questions in accordance with Vernon's Texas Statutes and Codes Annotated Government Code 2252.002, as amended:

Is the Bidder that is making and submitting this Bid a "Resident Bidder" or a "non-resident Bidder"?

Answer: Non-resident Bidder

- (1) Texas Resident Bidder- A Bidder whose principle place of business is in Texas and includes a Contractor whose ultimate parent company or majority owner has its principal place of business in Texas.
(2) Nonresident Bidder- A Bidder who is not a Texas Resident Bidder.

- B. If the Bidder is a "Nonresident Bidder" does the state, in which the Nonresident Bidder's principal place of business is located, have a law requiring a Nonresident Bidder of that state to bid a certain amount or percentage under the Bid of a Resident Bidder of that state in order for the nonresident Bidder of that state to be awarded a Contract on such bid in said state?

Answer: No Which State: California

- C. If the answer to Question B is "yes", then what amount or percentage must a Texas Resident Bidder bid under the bid price of a Resident Bidder of that state in order to be awarded a Contract on such bid in said state?

Answer: _____

Solicitation No. RFP SMW0122

**MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE (MBE/WBE)
PROCUREMENT PROGRAM
NO GOALS FORM**

SOLICITATION NUMBER: RFP SMW0122

PROJECT NAME: Data Center Relocation Consultant Services (in support of the Data Center Relocation (DCR) Project)

The City of Austin has determined that no goals are appropriate for this project. Even though no goals have been established for this solicitation, the Bidder/Proposer is required to comply with the City's MBE/WBE Procurement Program, if areas of subcontracting are identified.

If any service is needed to perform the Contract and the Bidder/Proposer does not perform the service with its own workforce or if supplies or materials are required and the Bidder/Proposer does not have the supplies or materials in its inventory, the Bidder/Proposer shall contact the Small and Minority Business Resources Department (SMBR) at (512) 974-7600 to obtain a list of MBE and WBE firms available to perform the service or provide the supplies or materials. The Bidder/Proposer must also make a Good Faith Effort to use available MBE and WBE firms. Good Faith Efforts include but are not limited to contacting the listed MBE and WBE firms to solicit their interest in performing on the Contract; using MBE and WBE firms that have shown an interest, meet qualifications, and are competitive in the market; and documenting the results of the contacts.

Will subcontractors or sub-consultants or suppliers be used to perform portions of this Contract?

No X If no, please sign the No Goals Form and submit it with your Bid/Proposal in a sealed envelope.

Yes If yes, please contact SMBR to obtain further instructions and an availability list and perform Good Faith Efforts. Complete and submit the No Goals Form and the No Goals Utilization Plan with your Bid/Proposal in a sealed envelope.

After Contract award, if your firm subcontracts any portion of the Contract, it is a requirement to complete Good Faith Efforts and the No Goals Utilization Plan, listing any subcontractor, subconsultant, or supplier. Return the completed Plan to the Project Manager or the Contract Manager.

I understand that even though no goals have been established, I must comply with the City's MBE/WBE Procurement Program if subcontracting areas are identified. I agree that this No Goals Form and No Goals Utilization Plan shall become a part of my Contract with the City of Austin.

HP Enterprise Services, LLC

Company Name

Deborah Jackson-Hamilton, HP Small Business Liaison

Name and Title of Authorized Representative (Print or Type)

Deborah Jackson-Hamilton
Signature

10-21-14
Date

Section 0900 No Goals

**MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE (MBE/WBE)
PROCUREMENT PROGRAM
NO GOALS UTILIZATION PLAN**
(Phase duplicate as needed)

SOLICITATION NUMBER: RFP SMW0122

PROJECT NAME: Data Center Relocation Consultant Services (in support of the Data Center Relocation (DCR) Project

PRIME CONTRACTOR/CONSULTANT COMPANY INFORMATION

Name of Contractor/Consultant	HP Enterprise Services, LLC		
Address	3000 Hanover Street MS 1064		
City, State Zip	Palo Alto, CA 94304		
Phone	703-742-1315	Fax Number	
Name of Contact Person	Deborah Jackson-Hamilton		
Is company City certified?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	MBE <input type="checkbox"/> WBE <input type="checkbox"/> MBE/WBE Joint Venture <input type="checkbox"/>	

I certify that the information included in this No Goals Utilization Plan is true and complete to the best of my knowledge and belief. I further understand and agree that the information in this document shall become part of my Contract with the City of Austin.

/Deborah Jackson-Hamilton, HP Small Business Liaison

Name and Title of Authorized Representative (Print or Type)

Deborah Jackson-Hamilton
Signature

10-21-14
Date

Provide a list of all proposed subcontractors/subconsultants/suppliers that will be used in the performance of this Contract. **Attach Good Faith Efforts documentation if non MBE/WBE firms will be used.**

Sub-Contractor/Consultant			
City of Austin Certified	MBE <input type="checkbox"/> WBE <input type="checkbox"/>	Ethnic/Gender Code:	<input type="checkbox"/> NON-CERTIFIED
Vendor ID Code			
Contact Person	Phone Number:		
Amount of Subcontract	\$		
List commodity codes & description of services			

Sub-Contractor/Consultant			
City of Austin Certified	MBE <input type="checkbox"/> WBE <input type="checkbox"/>	Ethnic/Gender Code:	<input type="checkbox"/> NON-CERTIFIED
Vendor ID Code			
Contact Person	Phone Number:		
Amount of Subcontract	\$		
List commodity codes & description of services			

FOR SMALL AND MINORITY BUSINESS RESOURCES DEPARTMENT USE ONLY:

Having reviewed this plan, I acknowledge that the proposer (HAS) or (HAS NOT) complied with City Code Chapter 2-9A/B/C/D, as amended.

Reviewing Counselor _____ Date _____ Director/Deputy Director _____ Date _____

Section 0900 No Goals



CITY OF AUSTIN, TEXAS
Purchasing Office
REQUEST FOR PROPOSAL (RFP)
OFFER SHEET

SOLICITATION NO: SMW0122

DATE ISSUED: September 1, 2014

REQUISITION NO.: RQM 14082600525

COMMODITY CODE: 91890

**FOR CONTRACTUAL AND TECHNICAL
ISSUES CONTACT THE FOLLOWING
AUTHORIZED CONTACT PERSON:**

Ms. Shawn M. Willett
Corporate Contract Compliance Manager

Phone: (512) 974-2274

E-Mail: Shawn.Willett@austintexas.gov

COMMODITY/SERVICE DESCRIPTION: Data Center
Relocation Consultant

PRE-PROPOSAL CONFERENCE TIME AND DATE: 9:30 AM
on September 17, 2014

LOCATION: One Texas Center, Room #500
505 Barton Springs Road, Austin TX 78704

PROPOSAL DUE PRIOR TO: 3:00 PM on October 10, 2014

PROPOSAL CLOSING TIME AND DATE: 3:00 PM on October
10, 2014

LOCATION: MUNICIPAL BUILDING, 124 W 8th STREET
RM 308, AUSTIN, TEXAS 78701

When submitting a sealed Offer and/or Compliance Plan, use the proper address for the type of service desired, as shown below:

P.O. Address for US Mail	Street Address for Hand Delivery or Courier Service
City of Austin	City of Austin, Municipal Building
Purchasing Office-Response Enclosed	Purchasing Office-Response Enclosed
P.O. Box 1088	124 W 8 th Street, Rm 310
Austin, Texas 78767-8845	Austin, Texas 78701
	Reception Phone: (512) 974-2500

To ensure prompt delivery, all packages SHALL BE CLEARLY MARKED ON THE OUTSIDE "Purchasing Office-Response Enclosed" along with the offeror's name & address, solicitation number and due date and time. See Section 0200 Solicitation Instructions for more details.

All Offers (including Compliance Plans) that are not submitted in a sealed envelope or container will not be considered.

SUBMIT 1 ORIGINAL, 8 COPIES, AND 1 ELECTRONIC COPY OF YOUR RESPONSE

*****SIGNATURE FOR SUBMITTAL REQUIRED ON PAGE 3 OF THIS DOCUMENT*****

This solicitation is comprised of the following required sections. Please ensure to carefully read each section including those incorporated by reference. By signing this document, you are agreeing to all the items contained herein and will be bound to all terms.

SECTION NO.	TITLE	PAGES
0100	STANDARD PURCHASE DEFINITIONS	*
0200	STANDARD SOLICITATION INSTRUCTIONS	*
0300	STANDARD PURCHASE TERMS AND CONDITIONS	*
0400	SUPPLEMENTAL PURCHASE PROVISIONS	6
0500	SCOPE OF WORK	10
0600	PROPOSAL PREPARATION INSTRUCTIONS & EVALUATION FACTORS	7
0601	COST PROPOSAL SHEET	4
0605	LOCAL BUSINESS PRESENCE IDENTIFICATION FORM – Complete and return	1
0700	REFERENCE SHEET – Complete and return if required	2
0800	NON-DISCRIMINATION CERTIFICATION	*
0805	NON-SUSPENSION OR DEBARMENT CERTIFICATION	*
0810	NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING CERTIFICATION	*
0815	LIVING WAGES AND BENEFITS CONTRACTOR CERTIFICATION–Complete and return	1
0835	NONRESIDENT BIDDER PROVISIONS – Complete and return	1

*** Documents are hereby incorporated into this Solicitation by reference, with the same force and effect as if they were incorporated in full text. The full text versions of these Sections are available, on the Internet at the following online address:**

http://www.austintexas.gov/financeonline/vendor_connection/index.cfm#STANDARDBIDDOCUMENTS

If you do not have access to the Internet, you may obtain a copy of these Sections from the City of Austin Purchasing Office located in the Municipal Building, 124 West 8th Street, Room #308 Austin, Texas 78701; phone (512) 974-2500. Please have the Solicitation number available so that the staff can select the proper documents. These documents can be mailed, expressed mailed, or faxed to you.

I agree to abide by the City's MBE/WBE Procurement Program Ordinance and Rules. In cases where the City has established that there are no M/WBE subcontracting goals for a solicitation, I agree that by submitting this offer my firm is completing all the work for the project and not subcontracting any portion. If any service is needed to perform the contract that my firm does not perform with its own workforce or supplies, I agree to contact the Small and Minority Business Resources Department (SMBR) at (512) 974-7600 to obtain a list of MBE and WBE firms available to perform the service and am including the completed No Goals Utilization Plan with my submittal. This form can be found Under the Standard Bid Document Tab on the Vendor Connection Website:

http://www.austintexas.gov/financeonline/vendor_connection/index.cfm#STANDARDBIDDOCUMENTS

If I am awarded the contract I agree to continue complying with the City's MBE/WBE Procurement Program Ordinance and Rules including contacting SMBR if any subcontracting is later identified.

The undersigned, by his/her signature, represents that he/she is submitting a binding offer and is authorized to bind the respondent to fully comply with the solicitation document contained herein. The Respondent, by submitting and signing below, acknowledges that he/she has received and read the entire document packet sections defined above including all documents incorporated by reference, and agrees to be bound by the terms therein.

Company Name: _____

Company Address: _____

City, State, Zip: _____

Federal Tax ID No. _____

Printed Name of Officer or Authorized Representative: _____

Title: _____

Signature of Officer or Authorized Representative: _____

Date: _____

Email Address: _____

Phone Number: _____

*** Proposal response must be submitted with this Offer sheet to be considered for award**

**CITY OF AUSTIN
PURCHASING OFFICE
SUPPLEMENTAL PURCHASE PROVISIONS
RFP SMW0122**

The following Supplemental Purchasing Provisions apply to this solicitation:

1. **EXPLANATIONS OR CLARIFICATIONS:** (reference paragraph 5 in Section 0200)

All requests for explanations or clarifications must be submitted in writing to the Purchasing Office no later than 5:00 pm on September 24, 2014 either via fax at (512) 974-2388 or email at shawn.willett@austintexas.gov.

2. **PRE-PROPOSAL MEETING AND SITE VISIT**

A Pre-Proposal Meeting will be held on September 17, 2014 at 9:30 AM at the following location:

One Texas Center
Suite 500 Conference Room
505 Barton Springs Road, 5th Floor
Austin, Texas 78704

3. **INSURANCE:** Insurance is required for this solicitation.

A. **General Requirements:** See Section 0300, Standard Purchase Terms and Conditions, paragraph 32, entitled Insurance, for general insurance requirements.

- i. The Contractor shall provide a Certificate of Insurance as verification of coverages required below to the City at the below address prior to contract execution and within 14 calendar days after written request from the City. Failure to provide the required Certificate of Insurance may subject the Offer to disqualification from consideration for award
- ii. The Contractor shall not commence work until the required insurance is obtained and until such insurance has been reviewed by the City. Approval of insurance by the City shall not relieve or decrease the liability of the Contractor hereunder and shall not be construed to be a limitation of liability on the part of the Contractor.
- iii. The Contractor must also forward a Certificate of Insurance to the City whenever a previously identified policy period has expired, or an extension option or holdover period is exercised, as verification of continuing coverage.
- iv. The Certificate of Insurance, and updates, shall be mailed to the following address:

City of Austin Purchasing Office
P. O. Box 1088
Austin, Texas 78767

B. **Specific Coverage Requirements:** The Contractor shall at a minimum carry insurance in the types and amounts indicated below for the duration of the Contract, including extension options and hold over periods, and during any warranty period. These insurance coverages are required minimums and are not intended to limit the responsibility or liability of the Contractor.

- i. **Worker's Compensation and Employers' Liability Insurance:** Coverage shall be consistent with statutory benefits outlined in the Texas Worker's Compensation Act (Section 401). The minimum policy limits for Employer's Liability are \$100,000 bodily injury each accident, \$500,000 bodily injury by disease policy limit and \$100,000 bodily injury by disease each employee.
 - (1) The Contractor's policy shall apply to the State of Texas and include these endorsements in favor of the City of Austin:
 - (a) Waiver of Subrogation, Form WC420304, or equivalent coverage
 - (b) Thirty (30) days Notice of Cancellation, Form WC420601, or equivalent coverage

**CITY OF AUSTIN
PURCHASING OFFICE
SUPPLEMENTAL PURCHASE PROVISIONS
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- ii. **Commercial General Liability Insurance:** The minimum bodily injury and property damage per occurrence are \$500,000 for coverages A (Bodily Injury and Property Damage) and B (Personal and Advertising Injury).
 - (1) The policy shall contain the following provisions:
 - (a) Contractual liability coverage for liability assumed under the Contract and all other Contracts related to the project.
 - (b) Contractor/Subcontracted Work.
 - (c) Products/Completed Operations Liability for the duration of the warranty period.
 - (d) If the project involves digging or drilling provisions must be included that provide Explosion, Collapse, and/or Underground Coverage.
 - (2) The policy shall also include these endorsements in favor of the City of Austin:
 - (a) Waiver of Subrogation, Endorsement CG 2404, or equivalent coverage
 - (b) Thirty (30) days Notice of Cancellation, Endorsement CG 0205, or equivalent coverage
 - (c) The City of Austin listed as an additional insured, Endorsement CG 2010, or equivalent coverage
- iii. **Business Automobile Liability Insurance:** The Contractor shall provide coverage for all owned, non-owned and hired vehicles with a minimum combined single limit of \$500,000 per occurrence for bodily injury and property damage. Alternate acceptable limits are \$250,000 bodily injury per person, \$500,000 bodily injury per occurrence and at least \$100,000 property damage liability per accident.
 - (1) The policy shall include these endorsements in favor of the City of Austin:
 - (a) Waiver of Subrogation, Endorsement CA0444, or equivalent coverage
 - (b) Thirty (30) days Notice of Cancellation, Endorsement CA0244, or equivalent coverage
 - (c) The City of Austin listed as an additional insured, Endorsement CA2048, or equivalent coverage.
- iv. **Professional Liability Insurance:** The Contractor shall provide coverage, at a minimum limit of \$1,000,000 per claim, to pay on behalf of the assured all sums which the assured shall become legally obligated to pay as damages by reason of any negligent act, error, or omission arising out of the performance of professional services under this Agreement.

If coverage is written on a claims-made basis, the retroactive date shall be prior to or coincident with the date of the Contract and the certificate of insurance shall state that the coverage is claims-made and indicate the retroactive date. This coverage shall be continuous and will be provided for 24 months following the completion of the contract.

- C. **Endorsements:** The specific insurance coverage endorsements specified above, or their equivalents must be provided. In the event that endorsements, which are the equivalent of the required coverage, are proposed to be substituted for the required coverage, copies of the equivalent endorsements must be provided for the City's review and approval.

4. **TERM OF CONTRACT:**

- A. The Contract shall be in effect for an initial term of twelve months and may be extended thereafter for up to one additional twelve month period, subject to the approval of the Contractor and the City Purchasing Officer or his designee.
- B. Upon expiration of the initial term or period of extension, the Contractor agrees to hold over under the terms and conditions of this agreement for such a period of time as is reasonably necessary to resolicit and/or complete the project (not to exceed 120 days unless mutually agreed on in writing).

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- C. Upon written notice to the Contractor from the City's Purchasing Officer or his designee and acceptance of the Contractor, the term of this contract shall be extended on the same terms and conditions for an additional period as indicated in paragraph A above.

5. **INVOICES and PAYMENT:** (reference paragraphs 12 and 13 in Section 0300)

- A. Invoices shall contain a unique invoice number and the information required in Section 0300, paragraph 12, entitled "Invoices." Invoices received without all required information cannot be processed and will be returned to the vendor.

Invoices shall be mailed to the below address:

	City of Austin
Department	Communications and Technology Management
Attn:	Accounts Payable
Address	P.O. Box 1088
City, State Zip Code	Austin, Texas 78767

- B. The Contractor agrees to accept payment by either credit card, check or Electronic Funds Transfer (EFT) for all goods and/or services provided under the Contract. The Contractor shall factor the cost of processing credit card payments into the Offer. There shall be no additional charges, surcharges, or penalties to the City for payments made by credit card.

6. **LIVING WAGES:**

- A. The minimum wage required for any Contractor employee directly assigned to this City Contract is \$11.00 per hour, unless Published Wage Rates are included in this solicitation. In addition, the City may stipulate higher wage rates in certain solicitations in order to assure quality and continuity of service.
- B. The City requires Contractors submitting Offers on this Contract to provide a certification (**see the Living Wages Contractor Certification included in the Solicitation**) with their Offer certifying that all employees directly assigned to this City Contract will be paid a minimum living wage equal to or greater than \$11.00 per hour. The certification shall include a list of all employees directly assigned to providing services under the resultant contract including their name and job title. The list shall be updated and provided to the City as necessary throughout the term of the Contract.
- C. The Contractor shall maintain throughout the term of the resultant contract basic employment and wage information for each employee as required by the Fair Labor Standards Act (FLSA).
- D. The Contractor shall provide with the first invoice and as requested by the Department's Contract Manager, individual Employee Certifications for all employees directly assigned to the contract. Employee Certifications shall be signed by each employee directly assigned to the contract. The Employee Certification form is available on-line at https://www.austintexas.gov/financeonline/vendor_connection/index.cfm.

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- D. Contractor shall submit employee certifications quarterly with the respective invoice to verify that employees are paid the Living Wage throughout the term of the contract. The quarterly Employee Certification Forms shall be submitted for employees added to the contract and/or to report any employee changes in that quarter. If no changes, submit a Contractor's Certification Form indicating no change.
- E. The Department's Contract Manager will periodically review the employee data submitted by the Contractor to verify compliance with this Living Wage provision. The City retains the right to review employee records required in paragraph C above to verify compliance with this provision.

7. NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING:

- A. On November 10, 2011, the Austin City Council adopted Ordinance No. 20111110-052 amending Chapter 2.7, Article 6 of the City Code relating to Anti-Lobbying and Procurement. The policy defined in this Code applies to Solicitations for goods and/or services requiring City Council approval under City Charter Article VII, Section 15 (Purchase Procedures). During the No-Contact Period, Offerors or potential Offerors are prohibited from making a representation to anyone other than the Authorized Contact Person in the Solicitation as the contact for questions and comments regarding the Solicitation.
- B. If during the No-Contact Period an Offeror makes a representation to anyone other than the Authorized Contact Person for the Solicitation, the Offeror's Offer is disqualified from further consideration except as permitted in the Ordinance.
- C. If an Offeror has been disqualified under this article more than two times in a sixty (60) month period, the Purchasing Officer shall debar the Offeror from doing business with the City for a period not to exceed three (3) years, provided the Offeror is given written notice and a hearing in advance of the debarment.
- D. The City requires Offerors submitting Offers on this Solicitation to certify that the Offeror has not in any way directly or indirectly made representations to anyone other than the Authorized Contact Person during the No-Contact Period as defined in the Ordinance. The text of the City Ordinance is posted on the Internet at: <http://www.ci.austin.tx.us/edims/document.cfm?id=161145>

8. NON-SOLICITATION:

- A. During the term of the Contract, and for a period of six (6) months following termination of the Contract, the Contractor, its affiliate, or its agent shall not hire, employ, or solicit for employment or consulting services, a City employee employed in a technical job classification in a City department that engages or uses the services of a Contractor employee.
- B. In the event that a breach of Paragraph A occurs the Contractor shall pay liquidated damages to the City in an amount equal to the greater of: (i) one (1) year of the employee's annual compensation; or (ii) 100 percent of the employee's annual compensation while employed by the City. The Contractor shall reimburse the City for any fees and expenses incurred in the enforcement of this provision.
- C. During the term of the Contract, and for a period of six (6) months following termination of the Contract, a department that engages the services of the Contractor or uses the services of a Contractor employee will not hire a Contractor employee while the employee is performing work under a Contract with the City unless the City first obtains the Contractor's approval.
- D. In the event that a breach of Paragraph C occurs, the City shall pay liquidated damages to the Contractor in an amount equal to the greater of: (i) one (1) year of the employee's annual

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compensation or (ii) 100 percent of the employee's annual compensation while employed by the Contractor.

9. WORKFORCE SECURITY CLEARANCE AND IDENTIFICATION (ID):

- A. Contractors are required to obtain a certified criminal background report with fingerprinting (referred to as the "report") for all persons performing on the contract, including all Contractor, Subcontractor, and Supplier personnel (for convenience referred to as "Contractor's personnel").
- B. The report may be obtained by reporting to one of the below governmental entities, submitting to fingerprinting and requesting the report [requestors may anticipate a two-week delay for State reports and up to a four to six week delay for receipt of a Federal report].
 - i. Texas Department of Public Safety for any person currently residing in the State of Texas and having a valid Texas driver's license or photo ID card;
 - ii. The appropriate governmental agency from either the U.S. state or foreign nation in which the person resides and holds either a valid U.S. state-issued or foreign national driver's license or photo ID card; or
 - iii. A Federal Agency. A current Federal security clearance obtained from and certified by a Federal agency may be substituted.
- C. Contractor shall obtain the reports at least 30 days prior to any onsite work commencement. Contractor also shall attach to each report the project name, Contractor's personnel name(s), current address(es), and a copy of the U.S. state-issued or foreign national driver's license or photo ID card.
- D. Contractor shall provide the City a Certified Criminal Background Report affirming that Contractor has conducted required security screening of Contractor's personnel to determine those appropriate for execution of the work and for presence on the City's property. A list of all Contractor Personnel requiring access to the City's site shall be attached to the affidavit.
- E. Upon receipt by the City of Contractor's affidavit described in (D) above and the list of the Contractor's personnel, the City will provide each of Contractor's personnel a contractor ID badge that is required for access to City property that shall be worn at all times by Contractor's personnel during the execution of the work.
- F. The City reserves the right to deny an ID badge to any Contractor personnel for reasonable cause, including failure of a Criminal History background check. The City will notify the Contractor of any such denial no more than twenty (20) days after receipt of the Contractor's reports. Where denial of access by a particular person may cause the Contractor to be unable to perform any portion of the work of the contract, the Contractor shall so notify the City's Contract Manager, in writing, within ten (10) calendar days of the receipt of notification of denial.
- G. Contractor's personnel will be required to wear the ID badge at all times while on the work site. Failure to wear or produce the ID badge may be cause for removal of an individual from the work site, without regard to Contractor's schedule. Lost ID badges shall be reported to the City's Contract Manager. Contractor shall reimburse the City for all costs incurred in providing additional ID badges to Contractor Personnel.
- H. ID badges to enter and/or work on the City property may be revoked by the City at any time. ID badges must be returned to the City at the time of project completion and acceptance or upon removal of an individual from the work site.
- I. Contractor is not required to obtain reports for delivery personnel, including but not limited to FedEx, UPS, Roadway, or other materials delivery persons, however all delivery personnel must present

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company/employer-issued photo ID and be accompanied by at least one of Contractor's personnel at all times while at the work site.

- J. The Contractor shall retain the reports and make them available for audit by the City during regular business hours (reference paragraph 17 in Section 0300, entitled Right to Audit).
10. **MONTHLY SUBCONTRACT AWARDS AND EXPENDITURES REPORT:** (reference paragraph 18 in Section 0300) (applicable when an MBE/WBE Compliance Plan is required)
- A. The Contractor must submit a monthly Subcontract Awards and Expenditures Report to the Contract Manager specified herein and to the Purchasing Office Contract Compliance Manager no later than the tenth calendar day of each month.
- B. Mail the Purchasing Office Copy of the report to the following address:
- City of Austin
Purchasing Office
Attn: Contract Compliance Manager
P. O. Box 1088
Austin, Texas 78767
11. **INTERLOCAL PURCHASING AGREEMENTS:** (applicable to competitively procured goods/services contracts).
- A. The City has entered into Interlocal Purchasing Agreements with other governmental entities, pursuant to the Interlocal Cooperation Act, Chapter 791 of the Texas Government Code. The Contractor agrees to offer the same prices and terms and conditions to other eligible governmental agencies that have an interlocal agreement with the City.
- B. The City does not accept any responsibility or liability for the purchases by other governmental agencies through an interlocal cooperative agreement.
38. **CONTRACT MANAGER:** The following person is designated as Contract Manager, and will act as the contact point between the City and the Contractor during the term of the Contract:

Darrell Rochte

CTM Data Center Supervisor

(512) 974-2103

*Note: The above listed Contract Manager is not the authorized Contact Person for purposes of the **NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING Provision** of this Section; and therefore, contact with the Contract Manager is prohibited during the no contact period.

Section 0500 Scope of Work – DCR Consultant

DRAFT 1.0

1. INTRODUCTION

The Communications and Technology Management (CTM) Department of the City of Austin (COA) is seeking qualified and experienced IT Consultants to support its Data Center Relocation (DCR) Project.

2. PURPOSE OF THE DCR PROJECT AND THIS RFP

The purpose of the DCR Project is to relocate the City's primary Data Center to a suitable long-term facility and close down the existing Data Center sites within the next five years (2015–2020)

The purpose of this RFP is to hire a DCR Consultant to oversee the project planning, design, and implementation activities.

3. THE GOAL OF THIS RFP

- A. The immediate goal is to relocate the Primary Data Center as soon as possible; this is broken into two phases. Phase 1 will be implemented with the option to do Phase 2. CTM is seeking firm fixed prices for this work described herein.
- B. The Backup Data Center relocation (Phase 3) and the Decommissioning of the Primary DC (Phase 4) may be done in future years.

4. OVERVIEW OF THE DCR CONSULTANT'S ROLE

Since the COA relies on its IT Infrastructure to support COA basic business functions, the success of the DCR Project is critical. The new Data Center must be designed and built properly and the move executed flawlessly in order to maintain consistent uptime. The DCR Consultant shall provide fundamental IT services in support of the DCR Project including, but not limited to, the following:

- Phase 1: DCR Master Planning Services: Overall Strategy for data centers in the City, business case for moving the primary data center, inventory of systems, tiering of applications, and move strategy for the systems in the primary data center.
- Phase 1: DCR Site Analysis, Selection, and Acquisition Services: Consultation in requirements and developing the Request for Proposal for a new Co-location data center.
- Phase 2: Data Center Design Services: Designing the new site after the selection of the new site is made.
- Phase 2: Data Center Move Planning, Coordination, and Implementation Services: Planning, coordinating, and managing the move to the new data center.

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The DCR Consultant is expected to provide optimal solutions that meet COA / CTM requirements and accurately align project scope, schedule, and budget. CTM's objectives for this project are to optimize our investments, improve performance, achieve availability objectives, and avoid costly problems with relocating the Data Centers with zero downtime. These Data Centers impact a multitude of COA business, financial, operational, technology, and facilities stakeholders. This situation creates complexity as each user group may have different objectives and requirements. Additionally, the time, capital commitments, and margin for error when designing and relocating a Data Center can be staggering. Given the tremendous complexities and risks (downtime, loss of revenues, jobs and reputation), our goal is to get it right the first time. It is CTM's intent that the DCR Consultant will work within CTM's current budget to develop a viable relocation plan.

The DCR Consultant is tasked with creating options to address the complexities mentioned above while reducing risks associated with strategic direction, design and relocation of Data Centers. DCR Consultants must have the unique ability to provide a truly integrated delivery framework across all involved disciplines, guiding the COA through complex, pivotal decisions, and keeping the project moving on schedule and within budget.

The ideal DCR Consultant will truly understand how to plan, design and implement IT and Data Center projects. Typically the DCR Consulting team shall be led by a very senior executive consultant and supported by other consultants who are experts within the strategy, operations, risk, technology, and facilities disciplines.

5. GENERAL INFORMATION AND INSTRUCTIONS

A. Title of the RFP

Data Center Relocation Consultant Services (in support of the Data Center Relocation (DCR) Project).

B. Clarification

The Scope of Work contained herein does not require the work of a professional engineer or work governed by Texas Government Code 2254 and any reference to "Engineer" or "Engineering" is intended to reflect a standard of IT architectural design.

C. Contract Terms & Conditions

- The City is seeking an initial 12-month contract in an amount not to exceed \$400,000 with a 12 month option for Phase 2 that is dependent on future budgets. Please price them separately. The city is looking for the DCR consultant who will provide the most services with the highest quality for this statement of work.
- The contract will include options from a full complement of DCR Consultant Services, but the contract will be structured for flexibility.
- The COA has the option of utilizing services on an as-needed basis.

D. DCR Project Timeline

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The DCR Project is projected to be implemented within a five year period. The project will commence during the FY2015 and is estimated to be completed no later than FY2020.

Phase 1 / FY2015 work is funded. Phase 2 / FY2016 may be funded. Funding for Phases 3 & 4 for FY2017 – 20 is uncertain and pricing is optional.

E. Intent of the RFP

The intent of this RFP is to solicit detailed proposals from DCR Consultants that address the project goals, objectives, and requirements set forth in this document. Despite the requirements and specifications set forth in this document, the City seeks to take advantage of the Consultant's creativity, problem-solving abilities, and expertise in the desired technologies and services.

The RFP process allows the Contractor to propose revisions, modifications, and / or alternative methods that may optimize or improve the City's desired outcomes. The City will consider and evaluate the Contractor's suggestions and concerns. Changes can be negotiated prior to finalizing and approving the contract that results from this RFP.

6. PRIMARY DATA CENTER VISION

The future CTM Primary Data Center will be a leading-edge / next-generation Data Center. Our vision for the desired future state of the CTM Primary Data Center includes:

- Tier 3 Data Center
- TIA-942 standard – Telecommunications Infrastructure Standards for Data Center
- Located on a suitable site that meets all site criteria
- Operates as a Hot Site with continuously available technology infrastructure in a consolidated IT environment
- Designed for mission-critical / high availability applications
- Houses major wired and wireless network nodes
- Supports long-term growth
- Capable of supporting a consolidated COA IT environment that includes CTM's Primary Data Center as well as possibly housing the other partner COA departments' primary and / or back-up systems.

7. SCOPE OF WORK

The proposed scope of work may include assisting CTM with the following activities (depending on the availability of funding and CTM's desires):

1. Phase 1: DCR Master Planning Services: Create a DCR Strategic Plan. This plan should be no more than 20 pages.
2. Phase 1: DCR Master Planning Services: Update Business Case for moving the primary data center to a co-location facility. This Business Case should be no more than 6 pages.

3. Phase 1: DCR Master Planning Services: Guide the Preparation of a detailed Data Center applications, systems, and networks inventory.
4. Phase 1: DCR Master Planning Services: Determine replacement items and their associated costs. Align technology refresh cycles with relocation schedule. Include any swing gear and associated costs (if required).
5. Phase 1: DCR Master Planning Services: Develop a move plan that includes a strategy for an equipment move sequence; back-up operations during the move; installation and testing; and transition into ongoing operations.
6. Phase 1: DCR Site Analysis, Selection, and Acquisition Services: Develop a comprehensive Data Center requirements profile for acquisition of a new location.
7. Phase 1: DCR Site Analysis, Selection, and Acquisition Services: Complete a site and DC facility selection and procurement process.
8. Phase 2: Data Center Design Services: Develop a technology design and space layout plan for the new facility (including complete specifications, drawings and technical documentation).
9. Phase 2: Data Center Move Planning, Coordination, and Implementation Services: Prepare an employee, management, consultant, and contractor communication plan.
10. Phase 2: Data Center Move Planning, Coordination, and Implementation Services: Develop a project management plan with schedule
11. Phase 2: Data Center Move Planning, Coordination, and Implementation Services: Conduct a post-move and project audit.

The DCR Consultant will advise CTM regarding key questions such as:

- Is a Data Center relocation to an Austin Colocation Facility and / or to a new or existing COA Data Center a better choice for the city?
- What will move?
- What will remain?
- When are these relocations supposed to happen?
- What is the financial plan?
- What is the role of in-house staff?
- Which vendors and contractors are needed and what are their roles?
- What is the migration strategy – forklift, swing, swap...?

8. PHASED IMPLEMENTATION PLAN

- Summary of the Phased Implementation Plan
 - Phase 1 will be implemented (considering the \$400,000 annual limit)

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- Phase 2 MIGHT be done, Dependent upon funding availability
 - CTM has future plans for a Phase 3 and 4 involving the backup data center depending on future funding.
- Phase 1 / FY2015 - Scope of Work – Primary DC
 - Move strategy and estimated costs
 - Business Case: Provide a full professionally-prepared justification including total cost of ownership (TCO) Analysis for the multi-year investments required to achieve the desired benefits based on the Feasibility Study, Strategic Plan, & Roadmap. The focus is to align scope, cost, and timeline.
 - Asset Inventory and application tiers
 - Guide Asset Inventory includes the entire IT Infrastructure hardware, software, and all other devices now in the Primary DC (which is now largely undocumented). Inventory all applications running in the Primary DC (along with supporting IT infrastructure or dependencies) and classify the applications according to availability levels into the proper Tiers 1 – 3.
 - Refer to the following for more information:
 - Phase 1 Cost Proposal Sheet
 - RFP Section 11 (below)
- Phase 2 – FY2016 Scope of Work – Primary DC
 - DC Design & Layout: Determine the Future-State design requirements for the new Primary DC site and develop complete design drawing and document set. The DCR Consultant must provide and oversee the contractor(s) that will perform the needed Equipment Installation Services. Moving equipment is a critical part of the project.
 - Move Plan / Execution Assistance: The DCR Consultant will develop a complete move implementation schedule including Tasks, Durations, Responsible Participants, Timeframes, Resources, and Dependencies.
 - Refer to the following for more information:
 - Phase 2 Cost Proposal Sheet
 - RFP Section 12 (below)

9. DCR CONSULTANT DELIVERABLES

Depending on the availability of funding, DCR Consultants deliverables may include, but are not limited to, the following:

- Comprehensive DC Requirements Profile
- Site and Building Selection Process (build, buy, or lease)
- Detailed Equipment and Applications Inventory
- New IT products / Services and their Associated Costs
- DCR Strategy, Scope, Costs, Timeline & Business Case
- Detailed DCR Project Plan New DC Facility Design (including a Space Layout & Technology Design)
- Detailed Move Plan that includes a strategy for an equipment move sequence; back-up operations during the move; installation and testing; and transition of ongoing operations
- Detailed Staff, Consultant, Contractor, Customer, and Management Communication Plans
- Post-Move and Project Audit.

10. Phase 1: MASTER PLANNING REQUIREMENTS

A. Business Case (maximum 6 pages)

One purpose of the RFP is to provide the minimum Business Case requirements for the DCR Consultant. The DCR Consultant must develop the Business Case for the DCR Project to support its proposed Feasibility Study, Strategic Plan, and Roadmap.

The main objective of this Business Case is to provide a full professionally-prepared justification for the multi-year investments required to achieve the desired benefits of the DCR Project. This Business Case must be in layman's language and its content and format must be suitable for presentation to the City Manager's Office and/or the Austin City Council.

Business Case requirements include, but are not limited to, the following:

1. Cost Budgets

Develop Cost Budgets for various aspects of the DCR Project as well as a Total Cost Budget for the entire DCR project that captures and presents the full TCO.

The Total DCR Project Cost Budget must adequately cover project master planning and pre-design work, facility lease and set-up, engineering design,, move planning, preparation, execution, new systems and equipment, site preparation and renovation, site closure, swing equipment, staff, tools, and outside expertise from vendors, contractors, and DCR Consultants and Specialists.

Acquiring and managing the budget and keeping Executive Management well informed are major challenges the DCR Consultant must address.

2. Financial Analysis

Financing such large capital projects forces many organizations to question whether they should own or lease such a facility, and how best to finance it.

For example, leasing a Colocation Data Center and relocating into it is a multimillion-dollar investment, so a detailed financial analysis is required to see whether leasing provides a better return than renovating or building a Data Center facility.

This DCR Project as currently envisioned includes several decisions of this kind. In each case, the relocation decision must be supported by a full financial analysis to justify the required investments. Best practices call for the following types of financial analysis:

- Total Cost of Ownership (TCO)
- Return on Investment (ROI)
- Break - Even Point Analysis (BEP)
- Net Present Value (NPV)

The DCR Consultant must perform and provide a full financial analysis for the proposed funding for each phase or part of this project as well as the entire project.

- B. Overall Strategy for Data Centers in the City (maximum 20 pages)
- DCR consultant will produce a document that will recommend a strategy for all the data centers in the City based on interviews with the Data Center team, interviews with the CTM executive team, industry best practices and other readily available information provided to the consultant. It will evaluate risk and cost to give the City advice on our current and future data center functionality.
- C. DCR consultant will help and guide the creation of a device and application inventory to use for migrating to a new data center. Much of this work still needs to be accomplished. This inventory will include application tiering so that a realistic move order can be created.
- D. DCR consultant will create a document describing the plan for the move. This will have a move order, and a basic plan for each type of system as to whether it will be physically moved or replaced using existing budget sources. This document is the primary concern for the City and should be the DCR ultimate deliverable. This plan should include the risks, estimated costs and estimates on outages if expected.

11. Phase 1: SITE ANALYSIS, SELECTION, & ACQUISITION REQUIREMENTS

Fully evaluate all types of renovate, build, and lease options and make recommendations to CTM when making any Data Center relocation decisions.

- A. Use an exhaustive site and building selection process. Proper consideration shall be given to criteria for site selection.
- B. The site and building selection process will be guided by the Requirements Profile and Business Case.
- C. As a general rule, avoid multi-story office buildings with small floor plans. Instead opt for a single story structure with large open floor spaces such as industrial structures.
- D. Develop Site Risk Assessment and Profile for each build, renovation, & lease option to identify and analyze the associated risks. These assessments will ensure that all issues and options are identified and properly considered and that the respective risks for each option are determined and properly evaluated.

12. Phase 2: PRIMARY DATA CENTER LAYOUT & DESIGN REQUIREMENTS

Minimum requirements for Data Center design includes, but is not limited to, the following IT systems and networks:

- Equipment Cabinet / Rack Systems

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- Telecommunications Networks
- Network Cabling Systems
- Network Routing and Switching Systems
- Server Systems (Virtual and potentially Cloud)
- Storage Systems
- Telephone PBX / VoIP Systems
- Network Security Systems
- Physical Security Systems
- Audio Visual Systems
- Wireless Communication System
- Remote Monitoring and Control Systems
- IT Facility System

13. Phase 2: DCR IMPLEMENTATION REQUIREMENTS

In general terms, any Data Center move project has four phases. Each phase is complex, time consuming, and must be highly coordinated with the other phases.

- Gather Move Requirements
- Develop a Move Plan
- Implement the Move
- Validate the Results of the Move

Minimum requirements for DCR Consultant's provision of Move Planning, Coordination, and Implementation Services including, but not limited to, the following:

- A. Detailed Move Plan including:
 - Logistics Calendar for Physical Move
 - Resource Plan
 - Communication Plan
 - Risk Management Plan
 - Detailed Move Plan Documentation
 - Change Control Plan
- B. Detailed Implementation Plan including:
 - Transition Project Plan
 - Application Plan
 - Network Transition Plan
 - Vendor Coordination Plan
 - Group / Bundle Plan
 - Customer Communication Plan
 - Risk Plan
 - Contingency Plan
 - Cleaning Plan
 - Cabinet / Rack Installation Plan
 - Cable Installation Plan

- Move Day Logistic Plan
- Implementation / Move Plan and Schedule
- Post-Move Verification / Final Acceptance

14. DCR CONSULTANT RESPONSIBILITIES

The purpose of this section of the RFP is to describe the DCR Consultant responsibilities.

- A. Upon award of the contract, the contractor will conduct a kick-off meeting with the CTM DCR Project Team to determine the tasks that will need to be accomplished and negotiate a schedule for their completion.
- B. Any on-site consultant and/or contractor must have cleared a criminal background check before having unescorted access to City facilities or remote access via the Internet. The background check must be performed by the City and must occur in person prior to the kick-off meeting.
- C. At the conclusion of the initial planning for the project, the DCR Consultant will create a project work plan including schedule (which estimates deliverable milestones and resource requirements).
- D. A draft version of each written deliverable will be produced by DCR Consultant for review by the CTM. CTM will provide feedback and corrections so that the DCR Consultant can publish and submit the final version.
- E. The DCR Consultant will conduct and document all meetings and interviews with CTM and/or City of Austin staff.
- F. Deliverables must be provided on the dates specified. Any changes to the delivery date must have prior approval (in writing) by the CTM Project Manager or designee.
- G. All deliverables must be submitted in a format approved by the CTM Project Manager or designee.
- H. If the deliverable cannot be provided within the scheduled time frame, the DCR Consultant is required to contact the CTM Project Manager or designee in writing with a reason for the delay and the proposed revised schedule. The request for a revised schedule must include the impact on related tasks and the overall project.
- I. A request for a revised schedule must be reviewed and approved in writing by the CTM Project Manager or designee before placed in effect.
- J. The DCR Consultant is required to provide the Project Manager or designee with bi- weekly written progress reports of this project. These are due to the City's Project Manager or

designee by the close of business on a mutually agreed upon day of every two weeks throughout the life of the project.

- K. The progress reports shall detail all work performed and completed during the previous two weeks for which the progress report is provided and shall present the work to be performed during the subsequent two weeks.
- L. The progress report shall identify any problems encountered or still outstanding with an explanation of the cause and resolution of the problem or how the problem will be resolved.
- M. The DCR Consultant will be responsible for conducting bi-weekly status meetings with the City's Project Manager or designee. The meetings will be held on a mutually agreed upon day, time and place of every two weeks. The meetings can be in person or over the phone at the discretion of the CTM Project Manager or designee.
- N. The DCR consultant must go through the City's background check before any onsite work can begin. This typically takes 4 weeks.

15. CITY OF AUSTIN RESPONSIBILITIES

The purpose of this section of the RFP is to describe the City of Austin's responsibilities.

- A. Provide workspace and facilities for DCR Consultant resources working on the project.
- B. Assign a Project Manager and core team.
- C. Ensure that resources will be available in a timely manner (as required).
- D. Staff will be available as requested for the interviews, meetings, briefings and workshops. These individuals will be experienced subject matter experts (SMEs) in the covered IT areas and will be able to make decisions as needed to advance the project.
- E. Provide meeting room facilities.
- F. Assist with scheduling City of Austin staff and facilities.
- G. Provide access to COA systems as required in accordance with City security policies and practices.

**CITY OF AUSTIN
PURCHASING OFFICE
PROPOSAL PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NUMBER: RFP SMW0122**

1. PROPOSAL FORMAT

Submit one original, eight (8) paper copies and one electronic version of the Proposal. The original Proposal must contain original signatures. Proposals must be typed on paper utilizing a minimum of 30% recycled content and have consecutively numbered pages. Proposals must be organized in the following format and information sequence. Use tabs to divide each part of your Proposal. Proposers should provide all details in the Proposal as required in Section 0500 Scope of Work and any additional information you deem necessary to evaluate your Proposal.

A. Tab 1 - Executive Summary

The Executive Summary with the following information:

1. Name of the proposing firm
2. Address of the proposing office
3. Contact names, telephone numbers, fax numbers, and e-mail addresses for individuals authorized to answer technical, price, and/or contract questions
4. General summation of proposal including a brief statement highlighting the significant features of the proposal and its component parts. Also include any additional information of a general nature, which will aid the evaluation team's understanding the thrust of the proposal.
5. Explanation of suitability of the services
6. Statement of any assumptions made

B. Tab 2 - Table of Contents

The Table of Contents shall include the following:

1. Index of the proposal contents
2. Index of tables and figures
3. Index of attachments

C. Tab 3 - Firm Background, Principal Officers and Business Organization

This section will include the following items:

1. Listing of the principal officers of the company, including name, title and tenure.
2. Specify the branch office or other subordinate element which will perform or assist in performing the work herein
3. Include the State which incorporated or licensed to operate
4. Project management organizational chart identifying the Project Manager and full time/part time project staff members, including resumes for project personnel and the amount of time each project staff member will be dedicated to the project.
5. State the name, location and date of all contracts that have been terminated or canceled within the past ten (10) years, prior to the expiration of their term. Disclose any judgments, any pending lawsuits, or unresolved disputes related to your operation within the past ten (10) years.

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6. The Contractor must disclose existing preferred business relationships with specific solution providers or proprietary information technology products.
7. Provide length of time firm has been in business. Length of time firm has worked with state/local governments.
8. List office locations, Austin, Texas and other.

D. Tab 4 – Expertise, Experience, Qualifications, and Professionalism

Describe your expertise, experience, qualifications, and professionalism as it applies to this project.

1. Demonstrate your knowledge and expertise in planning, design, and relocation of Data Centers and the government Information Technology environments for which work is to be performed.
2. Provide multiple references for equivalent projects where you have successfully guided other clients through similar efforts.
3. Describe strategies you will include which are intended to save the City time, trouble, and money. Focus on areas that are important to City such as the City's goal to implement a Data Center with very low impact on the environment that requires awareness of green issues and the technologies and strategies that will help City realize this goal.
4. Provide the names and qualifications of all professional personnel who will be assigned to this project. State the primary work assigned to each person and the percentage of time each person will devote to this work. Identify key persons by name and title.
5. Provide the resumes for all personnel who will be assigned to the project. Emphasize your areas of expertise (such as Data Center design and architecture). The City is interested in your core competencies and range of expertise and history through references, methodology, and number of competencies the team offers. Indicate how your specific levels of expertise and competencies overlap with the City's focus areas.
6. Provide an organization chart that shows the relationship of the people who would be assigned to the project and the deliverables they will be responsible for. Include an escalation plan showing the chain of command for issue resolution.
7. Provide examples of your professionalism such as participation in professional organizations and publication of documents, white papers and journal articles written by the individuals in your organization. Also provide examples of your leadership in developing industry standards such as the American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE) chapters, the European Union Code of Conduct for Data Centers and LEED Standards for Data Centers and other similar organizations.
8. Provide proof of any Certifications and Licenses applicable to this Scope of Work

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SOLICITATION NUMBER: RFP SMW0122**

E. Tab 5 – Technical Proposal

Define in detail your understanding of the requirements presented in the Statement of Work. Describe your approach and methodology for providing your proposed solution. Provide all details as required in the Statement of Work (Section 500) and any additional information you deem necessary to evaluate your proposal.

1. Explain Project Management Methodology and how the Methodology will be used in this project. Specific focus should be given to data center risk assessment methodology & standards used to fulfill these types of projects.
2. Outline of capability to deliver the required services including process, functional, and technical expertise.
3. Provide a brief overview of your most relevant engagements. Include the customer names and contact information, scope of work, time line and deliverables. Also include number of Contractor staff assigned, number of customer staff assigned, if engagement was completed on time and/or within budget and if any changes to scope were needed.
4. Describe your process for capturing and delivering best practices to your customers.
5. List in order the distinct steps and or components of your requirements gathering process (for example focus groups or surveys).
6. Propose a time line for a project of this scope

F. Tab 6 – Implementation/Deliverables Plan

Describe your implementation plan and schedule for accomplishing the required work.

1. The technical factors that will be considered and the depth to which each will be treated.
2. The degree of definition provided in each technical element of your Implementation Plan.
3. The points at which written, deliverable reports will be provided.
4. The amount of progress payments you are requesting upon successful completion of milestones or tasks

G. Tab 7 – Required Responses

1. Explain Project Management Methodology and how the Methodology will be used in this project. Specific focus should be given to data center risk assessment methodology & standards used to fulfill these types of projects.
2. Outline of your capability to deliver the required services including process, functional, and technical expertise.
3. Provide a brief overview of your most relevant engagements. Include the customer names and contact information including email addresses, scope of work, time line and deliverables. Also include number of Contractor staff assigned, number of customer staff assigned, if engagement was completed on time and/or within budget and if any changes to scope were needed.
4. Describe your process for capturing and delivering best practices to your customers.

**CITY OF AUSTIN
PURCHASING OFFICE
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SOLICITATION NUMBER: RFP SMW0122**

5. List in order the distinct steps and or components of your requirements gathering process (for example focus groups or surveys).
6. Propose a time line for a project of this scope

H. Tab 8 – Authorized Negotiator:

Include name, address, e-mail address, and telephone number of person in your organization authorized to negotiate Contract terms and render binding decisions on Contract matters.

I. Local Business Presence:

The City seeks opportunities for businesses in the Austin Corporate City Limits to participate on City contracts. A firm (Offeror or Subcontractor) is considered to have a Local Business Presence if the firm is headquartered in the Austin Corporate City Limits, or has a branch office located in the Austin Corporate City Limits in operation for the last five (5) years. The City defines headquarters as the administrative center where most of the important functions and full responsibility for managing and coordinating the business activities of the firm are located. The City defines branch office as a smaller, remotely located office that is separate from a firm's headquarters that offers the services requested and required under this solicitation. Points will be awarded through a combination of the Offeror's Local Business Presence and/or the Local Business Presence of their subcontractors. Evaluation of the Team's Percentage of Local Business Presence will be based on the dollar amount of work as reflected in the Offeror's MBE/WBE Compliance Plan or MBE/WBE Utilization Plan. Specify if and by which definition the Offeror or Subcontractor(s) have a local business presence.

J. Non-Collusion, Non-Conflict of Interest, and Anti-Lobbying:

- i. On November 10, 2011, the Austin City Council adopted Ordinance No. 20111110-052 amending Chapter 2-7, Article 6 of the City Code relating to Anti-Lobbying and Procurement. The policy defined in this Code applies to Solicitations for goods and/or services requiring City Council approval under City Charter Article VII, Section 15 (Purchase Procedures). During the No-Contact Period, Offerors or potential Offerors are prohibited from making a representation to anyone other than the Authorized Contact Person in the Solicitation as the contact for questions and comments regarding the Solicitation.
- ii. If during the No-Contact Period an Offeror makes a representation to anyone other than the Authorized Contact Person for the Solicitation, the Offeror's Offer is disqualified from further consideration except as permitted in the Ordinance.
- iii. If a Respondent has been disqualified under this article more than two times in a sixty (60) month period, the Purchasing Officer shall debar the Offeror from doing business with the City for a period not to exceed three (3) years, provided the Respondent is given written notice and a hearing in advance of the debarment.
- iv. The City requires Offerors submitting Offers on this Solicitation to provide a signed Section 0810, Non-Collusion, Non-Conflict of Interest, and Anti-Lobbying Affidavit certifying that the Offeror has not in any way directly or indirectly made representations to anyone other than the Authorized Contact Person during the No-Contact Period as defined in the Ordinance. The text of the City Ordinance is posted on the Internet at:
<http://www.ci.austin.tx.us/edims/document.cfm?id=161145>

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PURCHASING OFFICE
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- K. **Proposal Acceptance Period:** All proposals are valid for a period of one hundred and fifty (150) calendar days subsequent to the RFP closing date unless a longer acceptance period is offered in the proposal
- L. **Proprietary Information:** All material submitted to the City becomes public property and is subject to the Texas Open Records Act upon receipt. If a Proposer does not desire proprietary information in the proposal to be disclosed, each page must be identified and marked proprietary at time of submittal. The City will, to the extent allowed by law, endeavor to protect such information from disclosure. The final decision as to what information must be disclosed, however, lies with the Texas Attorney General. Failure to identify proprietary information will result in all unmarked sections being deemed non-proprietary and available upon public request.
- M. **Cost Proposal:** One (1) original printed cost proposal and worksheet on cd-rom (compatible with Microsoft Windows) to be submitted in a SEPARATE sealed envelope from the technical proposals. See Attachment 0601-Cost Proposal. Cost information provided should also include the following:
- i. Manpower: Itemize to show hourly for each category of personnel who may be performing work on the contract.
 - ii. Itemized cost of supplies and materials.
 - iii. Other itemized direct costs.
 - iv. If applicable, general and administrative burden. Indicate base used, percentage if applicable.
 - v. Travel expenses: All travel lodging expenses in connection with the Contract for which reimbursement may be claimed by the Contractor under the terms of the Solicitation will be reviewed against the City's Travel Policy as published and maintained by the City's Controller's Office and the Current United States General Services Administration Domestic Per Diem Rates (the "Rates") as published and maintained on the Internet at:

http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentId=17943&contentType=GSA_BASIC

No amounts in excess of the Travel Policy or Rates shall be paid. All invoices must be accompanied by copies of detailed receipts (e.g. hotel bills, airline tickets). No reimbursement will be made for expenses not actually incurred. Airline fares in excess of coach or economy will not be reimbursed. Mileage charges may not exceed the amount permitted as a deduction in any year under the Internal Revenue Code or Regulations.
 - vi. Printing: State separately the cost of furnishing copies of any reports, plans, etc.

2. **TAB 9 - EXCEPTIONS:**

Be advised that exceptions to any portion of the Solicitation may jeopardize acceptance of the Proposal. The Proposer must clearly indicate each exception taken and indicate the alternative language along with the business need for the alternative language. The failure to identify exceptions or proposed changes with a full explanation will constitute acceptance by the Proposer of the Solicitation as proposed by the City. The City reserves the right to reject a Proposal containing exceptions, additions, qualifications or conditions not called for in the Solicitation.

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PROPOSAL PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NUMBER: RFP SMW0122**

3. PROPOSAL PREPARATION COSTS:

All costs directly or indirectly related to preparation of a response to the RFP or any oral presentation required to supplement and/or clarify a proposal which may be required by the City shall be the sole responsibility of the Proposer.

4. EVALUATION FACTORS AND AWARD

A. **Competitive Selection:** This procurement will comply with applicable City Policy. The successful Proposer will be selected by the City on a rational basis. Evaluation factors outlined in Paragraph B below shall be applied to all eligible, responsive Proposers in comparing proposals and selecting the Best Offeror. Award of a Contract may be made without discussion with Proposers after proposals are received. Proposals should, therefore, be submitted on the most favorable terms.

B. Evaluation Factors:

i. 100 points.

Criteria	Description	% of Total
System Concept and Solutions Proposed	<p>Understanding of the technical requirements and specifications and the magnitude of the work to be accomplished as defined by COA; the completeness of the Consultant's proposal; the level of detail provided; and its conformance to specifications and standards.</p> <p>Grasp of the project concepts and the thoroughness of the services solutions proposed including responsiveness to terms and conditions and provision of the deliverables, technical data, and documentation.</p>	20
Demonstrated Applicable Experience and Expertise	<p>Prior experience of Contractor in successfully completing undertakings similar in nature and scope.</p> <p>An assessment of the Contractor's technical ability and expertise to provide the desired services in the specified environment.</p>	25
Qualifications and Professionalism	<p>Qualifications of the DCR Consultant's staff assigned to project.</p> <p>Professionalism of the DCR Consultant's staff assigned to project.</p>	15
Implementation and Deliverables Plan	The DCR Consultant's work plan and schedule for delivery of the desired consultant services	10

**CITY OF AUSTIN
PURCHASING OFFICE
PROPOSAL PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NUMBER: RFP SMW0122**

Criteria	Description	% of Total
	(as described herein). An assessment of the proposed DCR services including DCR master planning services.	
Total Evaluated Cost	Total evaluated cost of Consultant Services based on Cost Proposal Sheet, Section 0610	20
Local Business Presence	90% to 100% (10 Points) 75% to 89% (8 points) 50% to 74% (6 points) 25% to 49% (4 points) 1% and 24% (2 points) No local presence (0 points)	10
Total		100

- ii. Interviews/Presentations/Demonstrations Optional. Interviews and/or Presentations may be conducted at the discretion of the City. Maximum 25 points.

The City reserves the right to require short listed vendors selected for demonstrations or presentations to provide a minimum of two (2) most recent years of audited annual reports that evidence the financial health of the organization. In the event that audited financial statements cannot be provided, the Vendor must provide financial information that will enable the City to accurately assess financial stability and viability. Vendors unwilling to provide this information or whose financial information is deemed as not demonstrating financial stability will not be considered for award.

DCR CONSULTANT SCOPE OF WORK

PHASE 1 - PRIMARY DC RELOCATION - PRICING SHEET

DCR CONSULTANT DELIVERABLE

**FIRM FIXED
PRICE**

DCR SERVICE GROUP

REQUIREMENTS

\$_____.

Master Plan Services

Overall Strategy for data centers in the city (20 pages), business case for moving the primary data center (6 pages), inventory of systems, tiering of applications and move strategy for the systems in the primary data center.

\$_____.

Master Plan Services

Consultation in requirements and putting together the Request for Proposal for a new Co-location data center.

PHASE 1 TOTAL = \$_____.

Please provide any additional pricing information on a separate page

DCR CONSULTANT SCOPE OF WORK

PHASE 2 - PRIMARY DC RELOCATION - PRICING SHEET

DCR CONSULTANT DELIVERABLE	FIRM FIXED PRICE	DCR SERVICE GROUP	REQUIREMENTS
Data Center Design Services: Primary data center	\$____.____	Site Selection Services	Designing the new site after the selection of the new site is made.
Data Center Move Planning, Coordination, and Implementation Services: Primary data center	\$____.____	Design & Deployment Services	planning, coordinating and managing the move to the new data center
PHASE 2 TOTAL =		\$____.____	

Please provide any additional pricing information on a separate page

DCR CONSULTANT SCOPE OF WORK

OPTIONAL PHASE 3 - BACK-UP DC RELOCATION SERVICES - PRICING INFORMATION SHEET

DCR CONSULTANT DELIVERABLE	TYPICAL PRICE	DCR SERVICE GROUP	REQUIREMENTS
DCR Business Case - Back-Up DC	\$____.____	Master Plan Services	Provide a full professionally-prepared justification including a TCO for the multi-year investments required to achieve the desired benefits based on the Feasibility Study, Strategic Plan, & Roadmap. The focus is to align scope, cost, and timeline.
IT Asset Inventory - Back-Up DC	\$____.____	Master Plan Services	Includes all hardware & software in the Back-Up DC (which is undocumented)
Application Tiering - Back-Up DC	\$____.____	Master Plan Services	Inventory & Classification of all apps running in the Back-Up DC with supporting IT infrastructure (or dependencies)
Site Selection Services - Back-Up DC	\$____.____	Site Selection Services	Site Criteria / Build, Renovate, or Lease Analysis / Risk Assessments / Development of Bid Documents / Vendor Evaluations / Contract Negotiation Assistance
Design & Deployment Services - Back-Up DC	\$____.____	Design & Deployment Services	Layout / Design / Procurement / Installation, Testing & Commissioning / Transition into Operations (including full drawing & documentation set)
Move Planning & Implementation - Back-Up DC	\$____.____	Move Services	Data Center move project has four phases. Each phase is complex, time consuming, and must be highly coordinated with the other phases. - Gather Move Requirements / Develop a Move Plan / Implement the Move / Validate the Results of the Move
PHASE 3 TOTAL = \$____.____			

DCR CONSULTANT SCOPE OF WORK
OPTIONAL DECOMMISSIONING PRICING INFORMATION SHEET

DCR CONSULTANT DELIVERABLE	TYPICAL PRICE	DCR SERVICE GROUP	REQUIREMENTS
DCR Decommissioning Plan with Business Case - Primary DC	\$____.____	Master Plan Services	Return 10th floor to the condition agreed upon with AWU (assume unfinished space)
Design, Build, & Equip a New Telecom Room (WCC - 10th Floor)	\$____.____	Design & Deployment Services	Includes all hardware & software in the Primary DC (which is undocumented)
Remove all DC Facility Systems, Racks, & other IT gear (that was not relocated)	\$____.____	Move Services	Remove the raised floor / IT electrical, mechanical, & plumbing systems / Chillers / Batteries / Fuel Tank / Etc.
DC Equipment Removal Services	\$____.____	Move Services	Reuse / Resale / Recycle / Dispose of Hazardous Waste & all DC Equipment Removed
<p>PHASE 4 TOTAL = \$____.____</p>			

Section 0605: Local Business Presence Identification

A firm (Offeror or Subcontractor) is considered to have a Local Business Presence if the firm is headquartered in the Austin Corporate City Limits, or has a branch office located in the Austin Corporate City Limits in operation for the last five (5) years. The City defines headquarters as the administrative center where most of the important functions and full responsibility for managing and coordinating the business activities of the firm are located. The City defines branch office as a smaller, remotely located office that is separate from a firm's headquarters that offers the services requested and required under this solicitation.

OFFEROR MUST SUBMIT THE FOLLOWING INFORMATION FOR EACH LOCAL BUSINESS (INCLUDING THE OFFEROR, IF APPLICABLE) TO BE CONSIDERED FOR LOCAL PRESENCE.

NOTE: ALL FIRMS MUST BE IDENTIFIED ON THE MBE/WBE COMPLIANCE PLAN OR NO GOALS UTILIZATION PLAN, SECTION 0900 OF THE SOLICITATION.

USE ADDITIONAL PAGES AS NECESSARY

OFFEROR:

Name of Local Firm						
Physical Address						
Is Firm located in the Corporate City Limits? (circle one)	Yes			No		
In business at this location for past 5 yrs?	Yes			No		
Location Type:	Headquarters	Yes	No	Branch	Yes	No

SUBCONTRACTOR(S):

Name of Local Firm						
Physical Address						
Is Firm located in the Corporate City Limits? (circle one)	Yes			No		
In business at this location for past 5 yrs?	Yes			No		
Location Type:	Headquarters	Yes	No	Branch	Yes	No

SUBCONTRACTOR(S):

Name of Local Firm						
Physical Address						
Is Firm located in the Corporate City Limits? (circle one)	Yes			No		
In business at this location for past 5 yrs?	Yes			No		
Location Type:	Headquarters	Yes	No	Branch	Yes	No

Section 0815: Living Wages and Benefits Contractor Certification

Company Name _____

Pursuant to the Living Wages and Benefits provision (reference Section 0400, Supplemental Purchase Provisions) the Contractor is required to pay to all employees directly assigned to this City contract a minimum Living Wage equal to or greater than \$11.00 per hour.

I hereby certify under penalty of perjury that all of the below listed employees of the Contractor who are directly assigned to this contract are compensated at wage rates equal to or greater than \$11.00 per hour.

Employee Name	Employee Job Title

USE ADDITIONAL PAGES AS NECESSARY

- (1) All future employees assigned to this Contract will be paid a minimum Living Wage equal to or greater than \$11.00 per hour.
- (2) Our firm will not retaliate against any employee claiming non-compliance with the Living Wage provision.

A Contractor who violates this Living Wage provision shall pay each employee affected the amount of the deficiency for each day the violation continues. Willful or repeated violations of the provision may result in termination of this Contract for Cause and subject the firm to possible suspension or debarment.

Section 0835: Non-Resident Bidder Provisions

Company Name _____

- A. Bidder must answer the following questions in accordance with Vernon's Texas Statutes and Codes Annotated Government Code 2252.002, as amended:

Is the Bidder that is making and submitting this Bid a "Resident Bidder" or a "non-resident Bidder"?

Answer: _____

(1) Texas Resident Bidder- A Bidder whose principle place of business is in Texas and includes a Contractor whose ultimate parent company or majority owner has its principal place of business in Texas.

(2) Nonresident Bidder- A Bidder who is not a Texas Resident Bidder.

- B. If the Bidder is a "Nonresident Bidder" does the state, in which the Nonresident Bidder's principal place of business is located, have a law requiring a Nonresident Bidder of that state to bid a certain amount or percentage under the Bid of a Resident Bidder of that state in order for the nonresident Bidder of that state to be awarded a Contract on such bid in said state?

Answer: _____ Which State: _____

- C. If the answer to Question B is "yes", then what amount or percentage must a Texas Resident Bidder bid under the bid price of a Resident Bidder of that state in order to be awarded a Contract on such bid in said state?

Answer: _____



ADDENDUM
PURCHASING OFFICE
CITY OF AUSTIN, TEXAS

REQUEST FOR PROPOSAL NO: SMW0122
ADDENDUM NO. 1
DATE OF ADDENDUM: SEPTEMBER 16, 2014

This addendum is to incorporate the following changes to the solicitation:

A. The following call in number may be used to call in to the Pre-Proposal Meeting:

Phone Number (512) 974-9300
Access Code : 129219

All other terms and conditions remain the same.

BY THE SIGNATURES affixed below, Addendum #1 is hereby incorporated and made a part of the above referenced Solicitation.

APPROVED BY: Shawn M. Willett.
Shawn M. Willett, Corporate Contract Compliance Manager
Purchasing Office, 512-974-2274

AFFIRMED BY:

_____.	_____.	_____.
SUPPLIER	AUTHORIZED SIGNATURE	DATE

RETURN ONE (1) COPY OF THIS ADDENDUM TO PURCHASING OFFICE, CITY OF AUSTIN, WITH PROPOSAL RESPONSE OR PRIOR TO RESPONSE CLOSING. FAILURE TO DO SO MAY CONSTITUTE GROUNDS FOR REJECTION OF YOUR OFFER.



TO: Veronica Lara, Director
Department of Small and Minority Business Resources

FROM: Shawn Willett, Corporate Contract Compliance Manager

DATE: July 25, 2014

SUBJECT: Request for Determination of Goals for Solicitation No. RFP SMW0122

Project Name: Data Center Consultant Relocation Services
Commodity Code(s): 91890
Estimated Value: \$400,000 phase 1

Below are scopes of work for this project as determined by the Purchasing Office and Department that are contained in this solicitation.

No subcontracting opportunities have been identified for this project, this is a very specialized consulting service. Contract consists of specific consulting, planning, and designing services.

The Departmental Point of Contact is: Darrell Rochte at Phone: 974-2103

Per paragraph 8.2.1 of the Rules Governing the Minority and Women Owned Business Enterprise Procurement Program, please approve the use of the above goals by completing and returning the below endorsement. If you have questions, please call me at 512-322-6586.

☐ Approved w/ Goals ☒ Approved, w/out Goals

Recommend the use of the following goals based on the below reasons:

- a. Goals: _____% MBE _____% WBE
- b. Subgoals _____% African American _____% Hispanic
_____% Native/Asian American _____% WBE

This determination is based on the following reasons:

There are very limited subcontracting opportunities. Phase 1 to be used strictly for consulting purposes. Historically the Prime Consultant will perform the work with his work force.

Veronica Lara
Veronica Lara, Director

Date: 8/19/14

cc: Lorena Resendiz



ADDENDUM
PURCHASING OFFICE
CITY OF AUSTIN, TEXAS

REQUEST FOR PROPOSAL NO: SMW0122
ADDENDUM NO. 1
DATE OF ADDENDUM: SEPTEMBER 16, 2014

This addendum is to incorporate the following changes to the solicitation:

A. The following call in number may be used to call in to the Pre-Proposal Meeting:

Phone Number (512) 974-9300
Access Code : 129219

All other terms and conditions remain the same.

BY THE SIGNATURES affixed below, Addendum #1 is hereby incorporated and made a part of the above referenced Solicitation.

APPROVED BY: Shawn M. Willett.
Shawn M. Willett, Corporate Contract Compliance Manager
Purchasing Office, 512-974-2274

AFFIRMED BY:

_____.	_____.	_____.
SUPPLIER	AUTHORIZED SIGNATURE	DATE

RETURN ONE (1) COPY OF THIS ADDENDUM TO PURCHASING OFFICE, CITY OF AUSTIN, WITH PROPOSAL RESPONSE OR PRIOR TO RESPONSE CLOSING. FAILURE TO DO SO MAY CONSTITUTE GROUNDS FOR REJECTION OF YOUR OFFER.



Amendment No. 1
to
Contract No. NA150000088
for
Data Center Relocation Consultant
between
HP Enterprise Services, LLC
and the
City of Austin

- 1.0 The City hereby exercises this extension option for the subject contract. This extension option will be June 9, 2016 through June 8, 2017. No options will remain.
- 2.0 The total contract amount is increased by \$900,000.00 by this extension period. The total contract authorization is recapped below:

Action	Action Amount	Total Contract Amount
Initial Term: 06/09/2015 – 06/08/2016	\$400,000.00	\$400,000.00
Amendment No. 1: Option 1 – Extension 06/09/2016 – 06/08/2017	\$900,000.00	\$1,300,000.00

- 3.0 MBE/WBE goals do not apply to this contract.
- 4.0 By signing this Amendment the Contractor certifies that the vendor and its principals are not currently suspended or debarred from doing business with the Federal Government, as indicated by the GSA List of Parties Excluded from Federal Procurement and Non-Procurement Programs, the State of Texas, or the City of Austin.
- 5.0 All other terms and conditions remain the same.

BY THE SIGNATURES affixed below, this amendment is hereby incorporated into and made a part of the above-referenced contract.

Sign/Date:

05/18/2016

Printed Name: Ernie Sanders

Authorized Representative

HP Enterprise Services, LLC
14231 Tandem Boulevard
Austin, Texas 78728
(512) 522-2416

Sign/Date:

6-2-16

Linell Goodin-Brown
Contract Compliance Supervisor
City of Austin
Purchasing Office
124 W. 8th Street, Ste. 310
Austin, Texas 78701