

**REQUEST FOR INFORMATION (RFI)**  
**MICROSOFT EXCHANGE SERVICES**  
**IN THE FORM OF WRITTEN AND ORAL VENDOR PRESENTATIONS**  
**BY THE**  
**STATE OF TENNESSEE**  
**Department of Finance and Administration**  
**RFI Number: 31701-03026**

**A. STATEMENT OF INTENT:**

The State of Tennessee (State), Department of Finance and Administration, Office for Information Resources (OIR), issues this Request for Information for the purpose of conducting market research regarding obtaining Microsoft Exchange Services from industry leaders and top performers.

Information provided will assist the State in understanding the current state of the marketplace, including commercial / government best practices, industry capabilities, innovative delivery approaches, commercial market service levels, performance strategies and measures.

The State is inquiring about a variety of topics with regard to Microsoft Exchange hosting, technologies, migration / implementation methodologies, and performance metrics / performance-based incentives. Prospective sellers of services and/or integrators are not required to respond to all of the inquiries. We understand the level of effort required to respond to every inquiry stated in this RFI. You may respond to one or all of the inquiries. Any information that you provide will be greatly appreciated.

The market research is not a competition. The information submitted either in writing or in oral presentations will be used only to improve the State's knowledge of private industry's capabilities. No evaluation of participating vendors will occur and your participation is not a promise of future business with the State.

Responding or not responding to this RFI does not preclude the vendor from bidding on any future solicitations. Pricing information must NOT be submitted with your information packets. The State appreciates your cooperation and looks forward to a meaningful and very productive collaborative market research effort.

The information gathered during the RFI is part of an ongoing procurement. In order to prevent an unfair advantage among potential bidders who did and did not respond to the RFI, the RFI responses will not be available until the open records period of the resulting RFP pursuant to Tennessee Code Annotated section 10-7-504(a)(7).

**B. BACKGROUND:**

The State intends to conduct a Microsoft Exchange 2010 procurement initiative to obtain the professional services of a vendor to implement a unified messaging and collaboration system that will encompass the migration of over 40,000 State employees from Novell GroupWise to Microsoft Exchange.

The State is considering a variety of implementation scenarios to include hosting within the State Data Center, to an externally vendor-hosted solution, to a combination of hosting within the State Data Center with some vendor services provided remotely. However, due to email security concerns, the State is leaning toward an approach that includes hosting within its Data Center. The State is interested in learning as much about the pros and cons of this State Data Center hosting approach as it can.

The State is currently building a second Data Center that will be operational prior to the end of next year. As a result, the State will have an in-house Disaster Recovery capability. The State would be interested if there were other alternatives that would be more appropriate for DR for Microsoft Exchange services.

The State currently uses FileNet P8 Content Manager as its email archival toolset. The State expects to continue to use FileNet P8 for email archiving, but would be interested in any pros and cons of using FileNet P8 versus other systems.

**C. GENERAL INSTRUCTIONS:**

**C.1. Submission Media**

To assist vendors in minimizing their costs in providing information, the State prefers that market research information be submitted either electronically to the point of contact's email listed in section D.1; or the vendor may submit information on CD to the point of contact's postal address.

**C.2. Oral Presentations**

If a vendor wishes to provide an oral presentation to the State in addition to a written submission, the State will allocate time during the week of 14 September 2009 for presentations. We will plan for two (2) hours for your presentation. The time slots are from 9:00 a.m. until 11:00 a.m. or 1:30 p.m. – 3:30 p.m. CST and will be scheduled on a first-come, first-served basis. The purpose of this presentation will be for the vendor to provide information that they believe will be of value to the State. The State may ask questions regarding various technologies and service approaches.

**C.3. Internally versus Externally Hosted Solutions**

The State is interested in understanding the various options that are available for implementing Microsoft Exchange services.

[RFI Inquiry 1: What does industry see are the pros and cons of the various options for implementing Microsoft Exchange services and is one option preferred over another?](#) [please refer to background section]

**C.4. Technologies**

The State is interested in existing or new and emerging technologies that will enhance our ability to provide a variety of informational and transactional services to constituents.

[RFI Inquiry 2: What does Industry see for the future of the unified messaging and collaboration services over the next 5 to 10 years?](#)

**C.5. Migration Methodology**

The State understands that the migration of 40,000 plus State employees from Novell Groupwise to Microsoft Exchange is a huge undertaking.

[RFI Inquiry 3: What are the various delivery methodologies for migration services and is one methodology better suited for a migration of the size of the State of Tennessee?](#)

**C.6. Interface Dependencies**

Currently many State agencies have in-house or vendor supplied applications that have API's into Groupwise [when an action occurs within the agency application an email is generated through Groupwise]. Some of these are considered mission critical applications for the agency.

[RFI Inquiry 4: How do you identify and address these interface dependencies as part of your implementation planning process?](#)

**C.7. Migration Tools**

To be timely, the migration of 40,000 plus State employees will require some type of automated tool.

[RFI Inquiry 5: What automated tools do you recommend using to assist in the preparation, migration and post-migration processes?](#)

### **C.8. Performance Metrics and Measurements**

Services provided to the State must meet quality and performance standards.

[RFI Inquiry 6](#): In your experience, what are the appropriate areas of migration / exchange services that should be measured and are there service level agreements (SLAs) that are more or less industry standards that should be applied?

### **C.9. Performance-Based Incentive Contract**

The State will provide performance-based incentive contracts where feasible.

[RFI Inquiry 7](#): What monetary incentives / disincentives would be beneficial to apply to a performance-based Microsoft Exchange migration and hosting contract?

### **C.10. Licensing Models**

The State will need to understand the various licensing models available (please do not provide any pricing in the response).

[RFI Inquiry 8](#): What licensing models are available?

[RFI Inquiry 9](#): Is one model more effective and efficient over the others?

### **C.11. Total Cost of Ownership**

The State understands there could be a number of scenarios regarding purchase of hardware, software, and services for Microsoft Exchange 2010 (please do not provide any pricing in the response).

[RFI Inquiry 10](#): Is there a lease to purchase option available?

[RFI Inquiry 11](#): At the end of the contract period, would the State own the hardware and/or software, or are there buy-out options?

### **C.12. Migration Approaches**

The State realizes that a migration the size of the State of Tennessee will be a complex and time-consuming process. The State has brainstormed a number of inquiries that would assist in the State's understanding of how complex and time-consuming this process could be. These are included below:

#### **Pre-Implementation Inquiries:**

- a) Are there user and administration considerations?
- b) What migration challenges are there in transitioning from a Novell GroupWise to Microsoft Exchange email systems?
- c) Is it best to migrate in a batch mode, or should mailboxes be done one at a time?
- d) Can all of the following be migrated?
  - All current, live emails and folders
  - User's archives with various archive locations
  - Contacts, personal contacts, etc.
  - Proxy access / delegation rights
  - Calendar, current items, reoccurring items, archived calendar items
- e) Can migrations be done during business hours or should they be done during off hours?
- f) How long would a migration of 40,000 employees take? What is good estimate for an average number of users that could be migrated in a normal 5-day work week?
- g) What is the most time-consuming part of the implementation / migration?
- h) What types of interactions are required between the implementation / migration team and the customer and / or the State system staff?

- i) What end-user / technical staff training would be necessary?
- j) Is physical access to the client site required?
- k) For a given implementation / migration scenario, what preparation work would the State need to provide?
- l) What would be a typical transition process from the current to a new system be like? Would a transition period of having both systems online concurrently be needed?
- m) What “Best Management Practices” do you recommend be followed during the entire Implementation process, including:
  - Any security / privacy policy considerations
  - eDiscovery
  - Cleanup options
  - Email restores
- n) What planning considerations are needed to address the following?
  - Secure Email Services
  - Existing In-box
  - Existing Sent Items
  - Calendar with attachments
  - Cabinet with multiple folders
  - Work in Progress
  - Junk Mail Items
  - Contacts (Address Books)
  - Personal Archive In-Box
  - Personal Archive Sent-Items
  - Personal Archive Cabinets with multiple folders
  - Proxy Access
  - Security
  - Access to Shared Resources
  - Connectivity to Blackberry

**Implementation Inquiries:**

- a) What are the considerations for Internet email connectivity, anti-virus, anti-spam during the migration processes and for the production environment afterwards?
- b) Are the archives, backup and restore solutions implemented at the same time with the proposed solution?
- c) What process would you recommend to minimize the risk of data loss?
- d) Will proxy access, rules, shared address books and shared folders be allowed? If so, how are these features transitioned to the new system?
- e) What issues surrounding conversion should be considered?
- f) How would the address books for both systems be maintained while conversion is taking place?
- g) Are there migration bandwidth requirements? If so, what are they?
- h) What post-implementation considerations are there? Surveys, reports, etc?

**C.13. Other Guidance for the State**

- a) Please share any other guidance you believe will be beneficial to the State as we prepare to transition to Microsoft Exchange.
- b) If you will, please share an example of a past migration project that you conducted.
  - How many stakeholders?
  - How long was the project?

- What was your Best Management Practices strategy?
- What were the risks?
- Why was it successful?
- What were the lessons learned?
- If you had the opportunity to do it over, what would you change?

**D. INSTRUCTIONS FOR RESPONDING**

**D.1. State Point of Contact**

Please feel free to contact the Department of Finance and Administration with any questions regarding this RFI. The point of contact is:

Lee Gregory  
Director, Procurement, Contract and Project Management  
Office for Information Resources  
Department of Finance and Administration  
17<sup>th</sup> Floor, Tennessee Tower  
312 Rosa Parks Avenue  
Nashville, TN 37243  
Phone: 615-253-2354  
Fax: 615-532-0471  
Email: [lee.gregory@tn.gov](mailto:lee.gregory@tn.gov)

**D.2. Response Times**

a) Written Responses

Please provide your written responses by close of business on **9 September 2009** (electronically or by snail mail). With your written RFI responses, please indicate whether you would like to provide an oral presentation to the State.

b) Optional Oral Presentations

The week of 14 September is allocated for Oral Presentations (please refer to C.2 above). The oral presentation location and date / time will be coordinated with the vendor's point of contact provided in the written RFI submission to the State.