

RFP Enterprise Data Storage Solution

RFP 12-2066 – Pre-Proposal Conference Meeting
Held April 3, 2012 at Metro Regional Center, Portland, Oregon

Welcome and Introduction

- Introduction of Metro Information Services staff in attendance
 - Key Names
 - **Procurement Analyst:** Sharon Stiffler
503-797-1613 | 503-797-1791 fax
Sharon.Stiffler@oregonmetro.gov
 - **Project Manager:** Les McCarter
- Description of RFP ground rules
 - All inquiries must be submitted in writing to Sharon Stiffler or asked in this April 3 pre-bid meeting
- April 3, 2012 Pre-Proposal Meeting ground rules
 - Save questions for the end. Answers will also be published

Background of Metro RFP and Storage

- High level description of the Agency
- The evolution of our storage environment
- Future direction of computing environment
 - Virtualization
- Driving Factors
 - Growth
 - Big bang, plus future added growth
 - Intelligent management of storage for varying needs
 - Cost
 - Ease of Management
 - Protection (DR, Backup, Replication)

RFP Goals

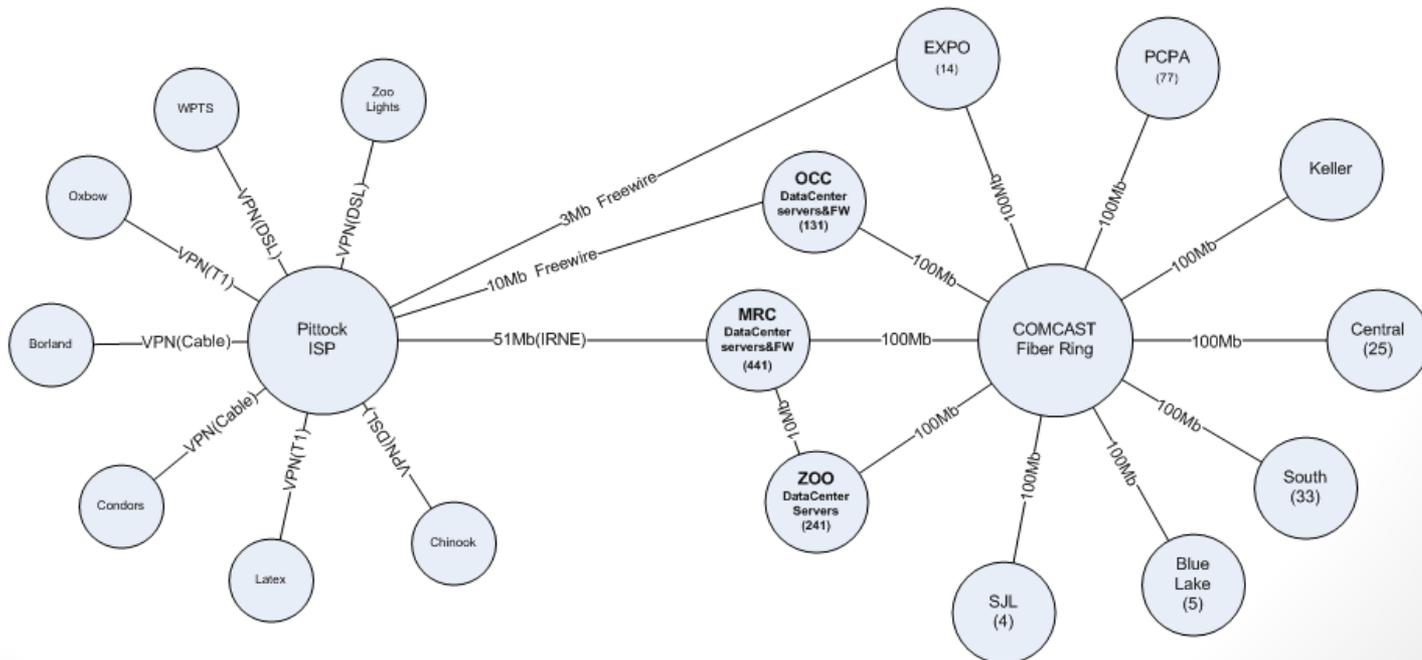
- Metro has not described a specific vendor technology or specification
 - Metro is looking to take advantage of modern solutions to a growing problem of increasing storage needs with a limited budget
 - Current storage technologies are adequate, space is not
 - We need to plan for the longer term
 - Looking for proven technology that will carry us into the future but not burden us with complexity
 - Ideally leverage new technologies for cost savings, right sized performance, data protection and uniformly managed

Metro

- Metro is a single government agency with many diverse departments located throughout the Portland metro area; with heavy concentrations of users at Metro Regional Center (MRC), Oregon Convention Center (OCC) and the Zoo
- While this RFP is a single department purchase for the agency, there are future budgets that have independent sources that may want to participate in expanding the storage.

Metro Data Network

100Mb WAN
Backbone



Specifics of Storage Systems Today

- Age of environment
 - 25-30 terabytes of storage from various systems are beyond their prime lifetime and should be replaced
- Estimate current size
 - **Table 2 – Description of Current Storage Usage** shows approximately 44 terabytes of storage in use; but not all will be replaced today
 - Our current bare minimum storage need is 35 terabytes; but this will not accommodate:
 - Need for expanding server virtualization
 - “Squirreled” away enterprise storage on personal storage devices/desktops
 - Future growth

Key

Table 2 – Description of Current Storage Usage

Not all of this data will be immediately migrated, but the information is provided as background material.

Table 2

Highlights

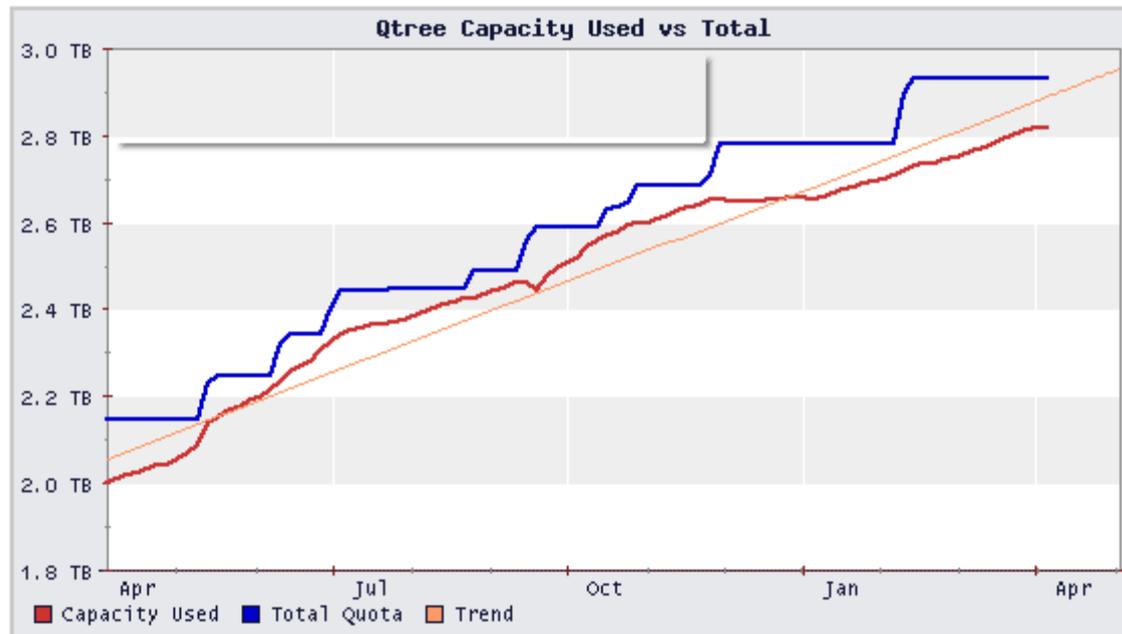
- File servers describe as *Work, Team* (3.1 TB, 1.5 TB) will grow
 - We know of 6 TB of files on external or local personal drives
- Sharepoint will grow and need higher performance IO
- ERP has experienced faster growth
- Moving to consolidated Exchange 2010 and potential for email archiving
- Server virtualization is only 40% complete

<u>Application</u>	<u>Type</u>	<u>Size</u>	<u>Performance</u>	<u>Nature of Data</u>	<u>Availability</u>
Files (work ,team)	CIFS/NFS	3.1TB	Low	Growing	Med
Files (jobs ,rtjs)	CIFS/NFS	550GB	Low	Static, small growth	Med
Oracle (sde and web DBs)	NFS	700GB	High	Static, small growth	High
Sharepoint	iSCSI	250GB	Med	Growing	High
ArcGIS Server	iSCSI/CIFS	3.1TB	Med	Static	High
ERP (erp, apps)	CIFS	300GB	Low	Static, small growth	Med
Web (www)	CIFS/NFS	200GB	Low	Static, small growth	High
System (profiles, common)	CIFS/NFS	50GB	Low	Static, small growth	Low
Shared (SWR)	CIFS	100GB	Low	Static, small growth	Med
Trim	CIFS	110GB	Low	Growing	High
VMware	NFS	800GB	High	Growing	High
Email	Local	600GB	High	Growing	High
Finance (HP PeopleSoft)	Local	100GB	Med	Static	High
HR (HP PeopleSoft)	Local	35GB	Med	Static	High
HR (Win PeopleSoft)	Local	?	Med	Static	High
DRC Projects	CIFS	12TB	Low	Growing	Med
Files (work ,team)	CIFS	1.5TB	Low	Growing	Med
Images	CIFS	375GB	Low	Static, growing	Low
ERP (erp, apps)	CIFS	100GB	Low	Static, growing	Med
System (profiles ,common)	CIFS	3GB	Low	Static, growing	Low
Email	Local	200GB	High	Growing	High
TRMS	CIFS/NFS	15.5TB	Low	Growing	Med
Email	Local	120GB	High	Growing	High
Files	Local	370GB	High	Growing	Med
Files	Local	330GB	Low	Growing	Med
Files	Local	200GB	Low	Growing	Med
Files	Local	200GB	High	Growing	Med
Files	Local	100GB	Low	Growing	Med

Sample Growth Rates

- Sample of our user file storage growth for past 12 months

alex:/vol1/work



Key item: we need more than extra spinning disk, but also a set of tools and philosophy to manage storage growth!

Core Requirements

Subset from RFP

ID	Category & Requirements	Importance	Description
1 Operations			
1.01	Reporting	1-Required	Provide details of included reporting capabilities; plus costs for additional reporting services if advantageous or necessary.
1.02	Monitoring	1-Required	Live monitoring and alerting of errors or events capabilities via email, SMS or other methods.
1.03	"Phone Home" / Automated Support Notification	1-Required	Ability for system to immediately and directly notify vendor support of significant issues that require service attention.
1.04	Tuning Tools	1-Required	Ability to change configuration to meet changing performance requirements (auto tuning is a bonus)
1.05	Quotas	1-Required	A realistic method of putting in place quotas for users, departments, groups across storage systems.
1.06	Multi-tenancy	1-Required	Ability for multiple tenants use secure "partitions or compartments" with a shared storage system.
2 Performance			
2.01	IO Speed	1-Required	While not all storage must be high speed access, the ability to provide high speed storage [both read and write] is important. Refer to Appendix for description of application and storage usage.
2.02	IO Bandwidth	1-Required	Ability to absorb and distribute large sets of data and minimize choke points
2.03	Hot Spot Avoidance	1-Required	Ability to avoid or move data location to avoid hot spots or traffic bottlenecks
2.04	Load balancing	1-Required	Ability to split traffic demands across multiple systems
2.05	Scalability	1-Required	Ability to grow the system both in depth of storage and in performance if required.
3 Protection			
3.01	High Availability	1-Required	Describe features to support high availability of data
3.02	Able to withstand "two" hardware failures	1-Required	Describe how system can withstand two simultaneous failure events; is there any combination of failure that could result in lost data? Subsystems to include but be limited to: power, disk, backplane, network data path, management modules, firmware.
3.03	Levels of redundancy	1-Required	How many levels of data redundancy exist? Describe.
3.04	Against disk failure	1-Required	Describe ability to withstand one or more disk failures
3.05	Against network failure	1-Required	Describe ability to withstand one or more storage network failures
3.06	Against bus failure	1-Required	Describe ability to withstand one or more bus subsystem failures

Core Requirements (Continued)

ID	Category & Requirements	Importance	Description
4 Application Interaction			
4.01	VMware - Server	1-Required	Describe ability to integrate & compliment VMware (include costs, tools and modules) for servers
4.02	Support for Microsoft CIFS (Common Interface File System) and NFS (Network File System) Protocols	1-Required	Must be able to serve up files and folders via both CIFS and NFS file sharing protocols and include support for Microsoft ACLs and auditing.
6 Migration			
6.01	Strategies to move from the "here and now" to the future world	1-Required	Metro cannot instantaneously move to new environment; vendor must provide both a long term migration plan that will fit budget and useful life of existing storage; plus actual data migration plan.
6.02	Tools to migrate	1-Required	List and description of both vendor tools and then customer tools that can be used to migrate files and data
6.03	Sample project plan with milestones	1-Required	Provide high level project plan complete with milestones that would highlight the effort required to migrate to new platform
7 Services			
7.01	Migration	1-Required	Provide a migration path (both immediate and long term) that can either be done by customer or as a client service; provide pricing if any.
7.02	Regular Health Checks	1-Required	Provide detailed timeline and scope of work for regular health checks; include pricing. Minimum time line is first 24 months.
7.03	Training	1-Required	Describe necessary staff training; describe approach, content and pricing
8 Support			
8.01	Support Choices / Costs	1-Required	Describe support structure and costs; include 4 hour response support, 4 hour business day response, next day contracts (or of similar nature).
9 Cost			
9.01	Module "add ons"	1-Required	Detail other modules that are required or recommended. Include costs to acquire and annual maintenance.
9.02	Annual Maintenance costs	1-Required	Include maintenance cost package for the first three years; plus a second cost package for the first five years.
9.03	Recommended equipment life span	1-Required	Describe the typical component life cycle used for future planning; also include end of life estimates
9.04	Recommended "maintenance" service calls	1-Required	Describe the recommend service / maintenance schedule / program
9.05	Provide cost estimates for increasing size of storage	1-Required	Vendor will provide pricing to meet existing Metro's storage area, but they are also to include costs (today) to increase storages size in 1 terabyte increments.

Requirements:

Highly Desired, Desired, Optional

- From RFP Page 3
 - “The proposed solution should be designed to effectively meet all of the capabilities that are labeled “1-Required” and as many as possible for the items labeled “2-Highly Desired.” Items listed as “2-Highly Desired” and “3-Desired” are not critical, but can play a factor in separating solutions that meet the core requirements when all else is equal. Items labeled “4-Optional” might be of interest to Metro based on the stated features and will be evaluated based on costs and capabilities.”
 - Do not ignore the items described as:
 - *Highly Desired*
 - *Desired*
 - *Optional*
 - Collectively they may influence our selection

Corrections to the published RFP:

- Page 4, item VII. PROPOSAL CONTENTS
 - **Old:** “The proposal should contain no more than seventy five (50) pages of written material ...”
 - **Corrected:** “The proposal should contain no more than ~~seventy five~~ **fifty** (50) pages of written material ...”
- Pages 2, 14, 23
 - **Old:** Cisco's USC
 - **Corrected:** Cisco's ~~USC~~ **UCS**
- Pages 16,
 - **Old:** Unis
 - **Corrected:** ~~Unis~~ **Unix**

Best Response Format

- See RFP for specific needs
 - Starting on Page 4
- Pricing:
 - “All pricing information should also be compared to list price, with a stated percentage discount. Metro also requests that bidders provide a secondary quote for additional storage purchases with a stated discount price from list that would be honored for 24 months after the acceptance of the bid, so that Metro can continue to grow their storage system over time.” (page 4 of RFP)
- Length:
 - “The proposal should contain **no more than fifty (50) pages** of written material (excluding biographies resumes and brochures, which may be included in an appendix)” (page 4 of RFP)

Best Response Format – Part Two

- To address VII. Proposal Contents; C: Approach
 - NEW! Use the Table 1 – Category & Requirements Format Spreadsheet posted on the web site

- Use the spreadsheet to match your solution with the RFP requirements
- State “Meets” or “Fails” for each requirement
- This counts as part of your page total! (No more than 50 pages total)

Metro Enterprise Data Storage Solution RFP 12-2066						
Response format for Table 1 - Category & Requirements						
Complete columns F & G.						
ID	Category & Requirements	Importance	Description	Meet / Fails	Solution Descriptions	
1	Operations					
1.01	Reporting	1-Required	Provide details of included reporting capabilities; plus costs for additional reporting services if advantageous or necessary.			
1.02	Monitoring	1-Required	Live monitoring and alerting of errors or events capabilities via email, SMS or other methods.			
1.03	"Phone Home" / Automated Support Notification	1-Required	Ability for system to immediately and directly notify vendor support of significant issues that require service attention.			

Selection Process

- From RFP Page 7:

	Percentage of Total Score
Project Work Plan/Approach	
1. Architectural Design	20
2. Solution Feature Set	20
Project Staffing Experience	
1. Vendor Experience	10
2. Vendor Technical Staff Expertise	5
Budget/Cost Proposal –	
1. Projected cost and future maintenance expense	25
Diversity	10
1. Work Force Diversity, Diversity in Contracting, Diversity of Firm	
Sustainable Business Practices	10
1. Environment, Economy, Community	
	100%

- We may elect to bring in top two to four finalists for more detailed questions
- We are planning to expedite the selection process

Open Questions

- This slide presentation and the new RFP response spreadsheet template will be placed on the web site later in the day
- Also answers to any questions asked in this meeting or submitted to us by April 9, 2012 at 3 pm
 - These question and answer updates will be published by April 10, 2012 at 3 pm
- **Open to questions from the floor**