



**Whatcom Transportation Authority**

**REQUEST FOR QUOTES**

**E-MAIL ARCHIVING SERVICES**

**#2012 - 200**

**QUOTE RELEASE DATE:  
Monday, January 30, 2012**

**QUOTE DUE DATE AND TIME:  
2:00 p.m. PST Monday, February 13, 2012**

**Whatcom Transportation Authority  
4111 Bakerview Spur Road  
Bellingham, WA 98226**

**Phone (360) 676-6843  
Fax (360) 527-4868**

## CALENDAR OF EVENTS

ACTIVITY	DATE
Request for Quotes	Monday, January 30, 2012
Questions/Clarifications Deadline	Thursday, February 9, 2012– 5:00 p.m. PST
<b>Request for Quotes Due</b>	<b>Monday, February 13, 2012- 2:00 p.m. PST</b>

# WTA E-MAIL ARCHIVING SERVICES RFQ 2012-200

## I. INTRODUCTION AND GENERAL PROJECT REQUIREMENTS

Whatcom Transportation Authority (WTA) is seeking quotes from qualified firms to provide hosted/cloud electronic mail (e-mail) archiving services for the WTA that meets the specifications stated in this Scope of Work. The WTA intends on awarding a contract to the successful bidder for a three (3) year period, with the option, at WTA's discretion, of two (2) additional one (1) year extensions.

Whatcom Transportation Authority (WTA) is a Public Transportation Benefit Area (PTBA) authorized by the legislature in Chapter 36.57A of the Revised Code of Washington and formed in 1983 as a municipal corporation. It is governed by a nine-member board of directors and employs approximately 215 employees. Of these 215 employees, approximately 100 are active e-mail users for the purposes of this quote. This number may increase or decrease over the span of the contract.

**Sealed quotes will be accepted by the WTA until Wednesday, February 13, 2012, 2:00 p.m. PST.** Bids must be signed, marked "QUOTE #2012-200", and may be either mailed or hand delivered to

Whatcom Transportation Authority  
QUOTE #2012-200  
4111 Bakerview Spur Road  
Bellingham, WA 98226

Questions or clarifications may be made prior to the clarification deadline to Chad Jorissen, Purchasing & Contracts Administrator, via phone at (360) 527-4874 or e-mail to [procurement@ridewta.com](mailto:procurement@ridewta.com). Contact with other WTA employees regarding this bid prior to award is strictly prohibited and may result in disqualification of bids.

Whatcom Transportation Authority reserves the right to accept or reject any and all bids, or any item or part thereof, or to waive any informalities.

## II. SCOPE OF WORK

Hosted/cloud e-mail archiving services must meet the following specifications:

- Be able to archive all e-mail sent or received by our Microsoft Office 365 © environment via journaling.
- Capture and store full metadata, body and attachments.
- Support the import of historical e-mail messages from PST files.
- Support date and recipient based retention policies.

- Allow messages to be retained indefinitely.
- Be priced only on the number of active recipients monthly.
- Provide full audit logs of access, search and retrieval.
- Support at least 3 different source e-mail systems.
- Provide robust search across multiple mail boxes.
- Allow search on headers (to, from, cc, date, subject), body, attachments (PDF, Word, Excel, Zip, Txt).
- Provide for e-discovery export into PST, EML and other standard formats.
- Allow different access levels, for example a public records officer can do searches but not change administrative settings.
- Provide a service that allows for high availability of 99.9% excluding pre-scheduled maintenance. The prospective vendor shall document and provide their pre-scheduled maintenance policies and windows of operation as part of this solicitation.
- Provide end-user archive access with ability to restore message to live mailbox.
- Authority shall retain ownership of any user created/loaded data.
- All data at rest must reside within the United States.

### III. VENDOR QUALIFICATIONS

WTA is seeking vendors with requisite experience, knowledge, and technical capacity in providing hosted and/or cloud-based e-mail archiving services. Experience and knowledge is defined as having provided like services within the last 2 years.

**Experience with hosted and/or cloud-based e-mail archiving services must be listed on the Reference Form included in quote package (Exhibit B).**

### IV. METHOD OF AWARD

An evaluation and selection process will be utilized. The award of this project shall be made to the offerer whose solicitation, in the opinion of the WTA, is responsive and best meets the scope of work. All aspects of evaluation will be taken into consideration in awarding this project. Price shall be a factor in the award decision, although the award may not necessarily be made to the solicitation with the lowest price. WTA reserves the right to reject any and all proposals

### V. INFORMATION TO BE PROVIDED IN YOUR QUOTE

To be considered responsive to this RFQ and to facilitate evaluations, Quotes should address and be organized in the order of the outline given below and include the following information.

Each Quote must include the signed Quote Form included in this RFQ (Exhibit A). Quotes must also have the completed Cover Page and a Cover Letter briefly summarizing the firm's qualifications and past experience relevant to the scope. A principal or officer of the firm authorized to execute contracts or other similar documents on the firm's behalf must sign the letter.

Quote Outline:

- 1) Cover Page
- 2) Cover Letter
- 3) Evidence of Firm's or Team's Ability to Perform Services:
  - a) Outline your firm's experience on the scope of work required for the appropriate discipline.
  - b) Describe your firm's overall approach, including organization and work tasks necessary to accomplish the objectives.
  - c) Describe any special requirements on WTA's part that you will require to properly provide services to WTA, i.e. network infrastructure, etc.
- 4) References (Exhibit B)

Provide at least two recent references (name and current contact information) who may be contacted concerning your firm's performance on a similar project.
- 5) Quote Sheet (Exhibit A)
- 6) Service Level Agreement

## **VI. EVALUATION CRITERIA**

Only those quotes that contain complete information, evidence of previous services provided and the ability to provide this service will be considered.

## **VII. RIGHT TO TERMINATE**

WTA may terminate this contract for any reason, in whole or in part, at any time by giving thirty (30) days written notice to the Contractor. The Contractor shall be paid its costs, in accordance with the terms of this Agreement, up to the time of termination. Contractor shall upon termination refund any pre-paid service months, provide full export of all user provided content in a format consistent with e-Discovery and email import practices.

**EXHIBIT A - QUOTE FORM**

**E-MAIL ARCHIVING SERVICES  
RFQ #2012-200**

**PRICES QUOTED ARE TO BE PER ACTIVE USER PER MONTH (UNIT PRICE)**

<b>PRICE PER ACTIVE USER PER MONTH YEARS 1 THRU 3*</b>	<b>PRICE PER ACTIVE USER YEAR 4 (AT WTA'S OPTION)*</b>	<b>PRICE PER ACTIVE USER YEAR 5 (AT WTA'S OPTION)*</b>
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\$ \_\_\_\_\_                      \$ \_\_\_\_\_                      \$ \_\_\_\_\_

<b>Additional Charges, i.e. initial setup, other (please specify) Exclude taxes</b>	<b>Additional Charges – Exclude taxes</b>	<b>Additional Charges – Exclude taxes</b>
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\$ \_\_\_\_\_                      \$ \_\_\_\_\_                      \$ \_\_\_\_\_

<b>Contract total (Monthly active user price X 36 Months + additional fees, exclusive of taxes)</b>	<b>Optional Year 4 total (Monthly active user price x 12 months + additional fees, exclusive of taxes)</b>	<b>Optional Year 5 total (Monthly active user price x 12 months + additional fees, exclusive of taxes)</b>
\$ _____	\$ _____	\$ _____

\*The proposer signing below agrees to keep their proposal open for sixty (60) calendar days after closing date. In the event of mathematical error, unit prices will prevail.

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Address/City/State/Zip

\_\_\_\_\_  
Phone/Fax/E-mail

\_\_\_\_\_  
Signature Authorized Representative

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

**THIS FORM MUST ACCOMPANY QUOTE**

**EXHIBIT B: CLIENT REFERENCE LIST**

**E-MAIL ARCHIVING SERVICES  
RFQ #2012-200**

Please provide name of business, contact and phone number of similar contracts.

Business	Contact	Phone
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**THIS FORM MUST ACCOMPANY QUOTE**