

## Appendix 8: Proposal Submittal Checklist

This appendix contains a compilation of the requirements identified in Section II (Proposal Requirements) document. It is provided as a tool for Proposer(s) to assist in identifying the required elements. Proposer(s) are responsible for ensuring their proposals are complete and address all RFP requirements by reviewing all of the solicitation documents and not relying exclusively on this checklist.

Req. ID	General Services Capability
GS-1	The Proposer <b>must</b> complete and submit applicable Questionnaires (Proposer and Subcontractor)
GS-2	The Proposer <b>must</b> describe its capability including all required elements (e.g. service portfolio, geographic locations, etc.)
GS-3	The Proposer <b>must</b> submit proof of financial stability (e.g. financial statements)
Req. ID	Corporate Experience
CE-1	The Proposer <b>must</b> describe relevant projects completed within the past 5 years. Description must include required elements (e.g. project description, period of performance, project cost, etc.)
CE-2	The Proposer <b>must</b> describe its qualifications/experience provided to public sector and healthcare clients within and outside Texas
CE-3	The Proposer <b>must</b> complete and submit the Reference form (3 relevant references within the past 3 years). Two references from healthcare and/or governmental entities preferred.
Req. ID	Network
NW-1	<p>The solution provider <b>must</b> provide a Network solution for Client (CSSS is optional) that provides appropriate secure connectivity for all locations to the host datacenter, the Internet and all server-based Client servers and applications.</p> <ul style="list-style-type: none"> <li>• The solution provider <b>must</b> offer a network solution providing at least T-1 capability for each site</li> <li>• The solution provider <b>must</b> offer multiple, optional solutions at 10 Mb, 100 Mb or better connectivity rates</li> </ul> <p>The solution provider <b>should</b> offer optional Multiprotocol Label Switching (MPLS) solutions (i.e. MPLS, non-MPLS)</p>
NW-2	The solution provider <b>must</b> provide services to facilitate procurement of network devices for each location where required (including the proposed Co-location center)
NW-3	The solution provider <b>must</b> provide services to: install, configure, monitor and manage network devices at each location as required
NW-4	The solution provider <b>must</b> provide services to monitor and manage network performance and availability
NW-5	The solution provider <b>must</b> provide authorized Client staff with secure remote connectivity (access) to hosted applications and equipment

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Req. ID	Data Center and Managed Services
DCMS-1	The solution provider <b>must</b> provide secure, rack-mounted datacenter co-location of all servers, required storage devices and required network devices
DCMS-2	The solution provider <b>must</b> provide safe and secure transportation and installation of all servers, required storage devices and required network devices
DCMS-3	The solution provider <b>should</b> offer options for datacenter connectivity, including options for bandwidth/speed, MPLS and Interactive Local Area Network (ILAN)
DCMS-4	The solution provider <b>must</b> provide services and solutions to maintain and monitor all co-location datacenter servers, required storage devices and required network devices, including OS maintenance and application of service packs
DCMS-5	The solution provider <b>must</b> provide services and solutions to backup server data.
DCMS-6	The solution provider <b>must</b> provide system administration of all servers and storage devices
DCMS-7	The solution provider <b>must</b> provide services for procurement and replacement of server equipment
DCMS-8	The solution provider <b>must</b> provide services for procurement and replacement of storage equipment
DCMS-9	The solution provider <b>should</b> provide solutions for File/Server Directory Management (e.g. indexing)
DCMS-10	The solution provider <b>should</b> provide services and solutions for server and storage resource usage and capacity planning
DCMS-11	The solution provider <b>should</b> provide Database Administration Services
DCMS-12	The solution provider <b>must</b> provide solutions for Disaster Recovery
Req. ID	Security
SEC-1	The solution provider <b>must</b> provide solutions for network security, including perimeter defense (firewall, intrusion detection and vulnerability scanning services)
SEC-2	The solution provider <b>must</b> provide solutions for malware prevention (including anti-virus and anti-spam)
SEC-3	The solution provider <b>must</b> provide "endpoint" security solutions for desktop, laptop and workstation security that allow enforcement of security policies. Examples of expected endpoint security solutions include: firewall, network access control (NAC), program control, antivirus, anti-spyware, data security, password audit capability and remote access.
SEC-4	The solution provider <b>must</b> provide solutions for HIPAA compliance.

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Req. ID	End User Equipment (Hardware)
EUE-1	The solution provider <b>must</b> provide solutions for replacement and rotation of PC workstations, Laptops and Tablet computers
EUE-2	The solution provider <b>must</b> provide solutions to maintain PC workstation, Laptops and Tablet computer operating systems, including service pack application
EUE-3	The solution provider <b>must</b> provide solutions for replacement of printers
EUE-4	The solution provider <b>must</b> provide solutions to maintain printers from each location
EUE-5	The solution provider <b>must</b> provide solutions for replacement of FAX equipment at each location
EUE-6	The solution provider <b>must</b> provide solutions for replacement of wireless devices at each location
EUE-7	The solution provider <b>must</b> provide solutions to maintain wireless devices at each location
EUE-8	The solution provider <b>must</b> provide solutions for replacement of scanner devices at each location
EUE-9	The solution provider <b>must</b> provide solutions to maintain scanner devices at each location
EUE-10	The solution provider <b>should</b> provide solutions for the procurement of PC workstations, Laptops, tablet computers, printers, Fax, wireless and scanner devices.
Req. ID	Standard Desktop Applications
APP-1	The solution provider <b>must</b> provide services to install and maintain the standard package of desktop applications
APP-2	The solution provider <b>should</b> provide services to install and maintain the other desktop applications
APP-3	The solution provider <b>should</b> provide services to install and maintain server and client components of administrative applications
APP-4	The solution provider <b>should</b> provide services to install and maintain server and client components of healthcare-specific applications
Req. ID	Support Services
Req. ID	Customer Support and Help Desk
SS-1	The solution provider <b>must</b> provide Customer Support and Help Desk services
SS-2	The solution provider <b>must</b> provide a solution for integrating Client's Application Support Services request ticketing and routing to appropriate Client application support resources
Req. ID	End User Equipment Support (OS)
SS-3	The solution provider <b>must</b> provide phone and on-site support for PC workstations, Laptops and Tablet computers (including wireless).
SS-4	The solution provider <b>must</b> provide phone and on-site support for Printers.
SS-5	The solution provider <b>must</b> provide phone and on-site support for FAX devices.
SS-6	The solution provider <b>must</b> provide phone and on-site support for wireless routers.
SS-7	The solution provider <b>must</b> provide phone and on-site support for scanners.
SS-8	The solution provider <b>must</b> provide phone and on-site support for telephone equipment.
SS-9	The solution provider <b>must</b> provide phone and on-site support for IP Phones.
Req. ID	Communications
SS-10	The solution provider <b>must</b> provide support for LAN and WAN Connectivity
SS-11	The solution provider <b>must</b> provide support for Remote Connectivity services
SS-12	The solution provider <b>must</b> provide support for Telephone services
Req. ID	Applications
SS-13	The solution provider <b>must</b> provide phone and on-site support for standard desktop applications

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Req. ID	Email Services
EM-1	The solution provider <b>must</b> provide Email services solution for all Client staff at least equivalent to services currently provided, including: <ul style="list-style-type: none"> <li>• Mailboxes for all staff</li> <li>• Calendar functionality</li> <li>• Distribution List functionality</li> <li>• Agent Functionality</li> </ul>
EM-2	The solution provider <b>must</b> provide Email services solution for all Client staff that provides sufficient capacity to allow transfers of large data files (e.g. video).
Req. ID	Internet Requirements
ISP-1	The solution provider <b>must</b> provide access to the Internet that is highly reliable and responsive to users.
ISP-2	The solution provider <b>must</b> provide a web site that supports ASP applications, Internet-based transactions (e.g. banking, employee self-service, etc.), web-based, interactive communications including, static text and video streaming and allows the following activities: <ul style="list-style-type: none"> <li>• Constituent relationship management (distributed newsletters)</li> <li>• Secure donation capability</li> <li>• Web-based registration (employment, applications, etc.)</li> </ul>
Req. ID	Intranet/Extranet Requirements
IE-1	The solution provider <b>must</b> provide web-based Intranet solution for all Client staff at least equivalent to services currently provided, including: <ul style="list-style-type: none"> <li>• Secure login and authentication for all staff</li> <li>• Industry/business-based templates for ease of update</li> <li>• Departmental content customization</li> <li>• Document management (organization of documents, spreadsheets, databases, images)</li> <li>• Video communications to internal users</li> <li>• Collaboration tools</li> <li>• Contact, calendar, and announcement tools</li> <li>• Discussion threads</li> </ul>
IE-2	The solution provider <b>must</b> provide Extranet solution that facilitates the following activities: <ul style="list-style-type: none"> <li>• Secure login and authentication for all users</li> <li>• Industry/business-based templates for ease of update</li> <li>• Departmental content customization</li> <li>• Document management (organization of documents, spreadsheets, databases, images)</li> <li>• Constituent “relationship” management system (e.g. e-newsletter and various communications to different groups of external stakeholders)</li> <li>• Secure capability to receive financial donations</li> <li>• Video communications to external users</li> <li>• Contact, calendar, and announcement tools</li> </ul>
Req. ID	Special Requirements
SP-1	The solution provider <b>should</b> provide a solution that allows staff the ability to send encrypted emails to internal staff, external stakeholders and patients
Req. ID	Capacity Management
CM-1	The Proposer <b>must</b> provide a description of its approach with required elements (monitoring and capacity planning process, reserve capacity, disk/storage management)

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Req. ID	Certifications
CRT-1	The solution provider <b>should</b> have certification from, or employ staff with certification from at least one of the following organizations (or equivalent) in each category: <ul style="list-style-type: none"> <li>• Industry (ITIL, Microsoft Partner, Other/General):</li> <li>• Telecommunications (Microsoft, Citrix, Cisco, Avaya, Other/General)</li> <li>• Quality (ISO, CPMM, SAS 70, Other)</li> <li>• Security (International Information Systems Security Certification Consortium (ISC), Global Information Assurance, Prosoft, Cisco, Checkpoint, Truesecure, Brainbench, CompTIA, Security Certified Program, Other/General)</li> </ul>
Req. ID	Risk Mitigation
RM-1	The solution provider <b>must</b> provide a risk mitigation strategy that should address: <ul style="list-style-type: none"> <li>• Technical issues</li> <li>• Remote Management</li> <li>• On-site Management</li> <li>• Resource issues</li> </ul>
RM-2	The solution provider <b>must</b> provide a disaster recovery/business continuity solution that contains the required data elements (e.g. processes – initiating, restoration, information maintained, testing, backup, equipment to minimize failure)
RM-3	The solution provider <b>must</b> provide a solution and services for back-up data/file retention
Req. ID	Procedures Documentation
PD-1	The solution provider <b>must</b> provide documentation regarding administrative procedures for distribution within Client to facilitate awareness of services provided and procedures for requesting services.
Req. ID	Asset Management
AIM-1	The solution provider <b>must</b> provide a solution to track and maintain information (e.g. configuration, utilization, etc.) regarding End User Equipment (including Workstations, laptops, printers and other peripherals)
AIM-2	The solution provider <b>must</b> provide a solution to track and maintain information (e.g. hard disk space, CPU utilization, up-time, memory usage, etc.) regarding Servers and Storage Equipment.
AIM-3	The solution provider <b>must</b> provide a solution to track and maintain information (e.g. configuration, up-time, utilization, etc.) regarding Network Equipment.
Req. ID	Software License Management
LIC-1	The solution provider <b>should</b> provide services to purchase and manage licenses for all standard desktop software applications, packages or bundles.
LIC-2	The solution provider <b>should</b> provide services to purchase and manage licenses for administrative, utility and healthcare-specific software applications, packages or bundles.
Req. ID	Hardware Maintenance Contract Management
HMC-1	The solution provider <b>must</b> provide services to manage hardware maintenance agreements for all servers, workstations, printers, and network equipment and devices.
Req. ID	Change Management
CHM-1	The solution provider <b>must</b> provide a Change Management methodology and process that includes the required elements (methodologies, tools, roles/responsibilities, etc.)
CHM-2	The solution provider <b>must</b> provide documentation regarding Change Management procedures to appropriate Client staff
Req. ID	Service Level Agreement
SLA-1	The solution provider <b>must</b> submit SLAs for categories covered in its proposed solutions that address the areas outlined in the RFP and that contain measurable and monitorable performance metrics.

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Req. ID	<b>Transition Project Management</b>
PM-1	The Proposer <b>must</b> submit a detailed approach with required elements (approach, timeline, project management processes/tools) and a preliminary project plan
PM-2	The Proposer <b>must</b> address the implementation timeframe and rollout strategy requirements outlined in the RFP
Req. ID	<b>Post Transition Services Staff Composition/Qualifications</b>
ST-1	The Proposer <b>must</b> provide a defined relationship structure with the Client that includes all elements: (designation of account manager and other key positions/qualifications, expected roles/responsibilities, etc.)
ST-2	The proposed Account Manager <b>must</b> meet the required experience and qualifications (3 years' data center operations, oral/written communication skills)
ST-3	The Proposer <b>must</b> provide a description of and references for the Account Manager's last two projects as outlined in the RFP.
Req. ID	<b>Technical Staff</b>
TS-1	The solution provider <b>must</b> provide (make available) qualified technical staff for all proposed support functions.
TS-2	The solution provider <b>must</b> provide documented assurance(s) that staff responsible for monitoring and maintenance of all technical equipment as part of a proposed solution and all related technical services are qualified, trained and experienced individuals.
Req. ID	<b>Account Management Approach</b>
AM-1	The Proposer <b>must</b> describe its account management approach with required elements: (structure, roles/responsibilities, collaboration/partnership strategies, reporting/billing, continuous improvement, knowledge transfer, benchmarking)
Req. ID	<b>Risk Management Approach</b>
RMA-1	The Proposer <b>must</b> describe its risk management approach with required elements: (contract/SLA changes, risk sharing, service continuity/ disaster recovery, dispute resolution, contract termination/disengagement requirements and process)
Req. ID	<b>Forms</b>
FM-1	Proposer Questionnaire (and Subcontractor Questionnaire if applicable) completed/submitted
FM-2	HUB Declaration complete and submitted along with HUB certifications (as applicable)
FM-3	Conflict-of-Interest Questionnaire complete and submitted
FM-4	Reference Form complete and submitted
FM-5	Cost Forms submitted (hard copy and electronically) including: one-time costs, service costs, ongoing costs, transition costs and cost summary