



Request for Proposal

Information Technology Software, Hardware, Services and Solutions

ID: RFP 60-24-03

Issued Jan. 5, 2024

**Responses due via email
by 4:30 p.m. CT on Feb. 16, 2024**

Please include RFP ID on all correspondence

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I. Introduction

The State Universities Retirement System (“SURS” or the “System”) is soliciting proposals from qualified and authorized partners and distributors to establish a multi-year Master Services Agreement (MSA) which acts as a procurement vehicle for information technology products, services, solutions and related products and services.

All forms/required documents needed to submit a request for proposal (RFP) are available on the SURS website at www.surs.org.

A responder’s preparation and submittal of a proposal or subsequent participation in presentations or contract negotiations creates no obligation on the System to award a contract or to pay any associated costs. All proposals and related materials will be retained by the System and will be subject to disclosure as required in accordance with the Illinois Freedom of Information Act.

II. Description of SURS

SURS is the administrator of a cost-sharing, multiple-employer, public employee retirement system that provides retirement, survivor, disability and death benefits to employees of Illinois state universities, community colleges, and certain other affiliated organizations and agencies. SURS was created in 1941, by an act of the Illinois General Assembly, and is governed by the Illinois Pension Code (40 ILCS 5/15-101 et seq.). SURS provides benefit services to over 250,000 members who work for 61 employers. SURS is responsible for investing assets in a diversified portfolio of U.S. and foreign stocks, bonds, real estate and alternative investments. SURS maintains a defined benefit plan, which on June 30, 2023, had assets valued at approximately \$23.2 billion. SURS also administers two defined contribution plans, the Retirement Savings Plan, which on June 30, 2023, had assets of approximately \$3.7 billion and the Deferred Compensation Plan, which had assets of approximately \$28.5 million. Northern Trust serves as SURS’ master trustee custodian.

An elected and appointed, eleven-person, board of trustees, governs SURS. Five members of the board are appointed by the governor of the state of Illinois (one of whom is the chairperson of the Illinois Board of Higher Education). The remaining six members of the board are elected by participating members (four individuals) and annuitants (two individuals). The governor designates the chairperson of SURS from among the eleven trustees. Trustees serve six-year terms. SURS is funded by participant payroll deductions and annual employer contributions, the majority of which are provided directly from the state of Illinois. By statute, SURS is defined as a “body politic and corporate” created by Article 15 of the Illinois Pension Code.

SURS currently employs approximately 162 staff, located in offices in Champaign and Naperville, Illinois. Two SURS employees are in the Naperville office. The remaining SURS employees are currently situated in two Champaign offices at 1901 Fox Drive and 1801 Fox Drive.

A copy of SURS' most recent annual comprehensive financial report (ACFR) is available for review, or to download, at www.surs.org.

The Illinois Governmental Ethics Act, 40 ILCS 420, provides guidelines for ethical practices concerning state and local pension plans. Responders should be familiar with the provisions of this Act.

Section 1-109.1(6) of the Illinois Pension Code (40 ILCS 5/1-109.1(6)) encourages Illinois public pension systems like SURS to utilize businesses owned by "minorities," "women," and "persons with disabilities" for all contracts and services, as those terms are defined in the Business Enterprise for Minorities, Women, and Persons with Disabilities Act ("BEMWPD," 30 ILCS 575). Additionally, Section 1-109.1(10) of the Illinois Pension Code (40 ILCS 5/1-109.1(10)) sets an aspirational goal of not less than 20 percent of contracts awarded to such businesses for "information technology services," "accounting services," "insurance brokers," "architectural and engineering services," and "legal services" as defined by the BEMWPD. Accordingly, businesses that meet these definitions are strongly encouraged to submit responses to this RFP.

A section of the Illinois Procurement Code concerning prohibitions of political contributions for vendors, 30 ILCS 500/50-37, may or may not apply to SURS service providers. However, each service provider should be familiar with the provisions of this section and comply with this section if the service provider deems it appropriate.

SURS is subject to its own procurement statutes and rules. Responders should be familiar with those procurement requirements as well. The selected responder will be paid by SURS directly.

Additional legal requirements that responders should be familiar with are contained in the Addendum to Contract under Appendix D.

III. Services Required

The State Universities Retirement System is soliciting proposals from qualified vendor(s) to enter into a Master Agreement for the procurement of a complete line of technology products, services, solutions and related products and services. These include but are not limited to the products and services noted in Appendix H and Appendix I. SURS reserves the right to select all or some of license products and services listed in Appendix E that best match its needs and budget for the product.

SURS recognizes that any one supplier may not provide all product lines. No computer-related products, supplies or services are excluded from this RFP. All computer product, supplies and accessories carried in a supplier's catalog(s), price book(s) or otherwise available by special order are part of this solicitation. User conference passes and other training and certification opportunities are in-scope and would be viewed as value-added offerings.

It is the intent of this RFP to issue multiple rewards. Multiple awards will ensure that any ensuing Master Agreements fulfill SURS current and future requirements.

IV. Minimum Qualifications

- The responder's key professionals and/or organization must not have material conflicts with SURS, SURS board, with any member of the SURS staff, with any party or vendor currently rendering services to SURS, and/or with any "immediate family members" affiliated with any of these groups.
- For SURS to determine whether any material conflicts exist, Responders must identify all current and prior affiliations of any kind that exist between the responder and any member of these identified groups in Appendix F. For purposes of this disclosure, "immediate family members" include the following: spouse, children, step-children, parents, step-parents, siblings, step-siblings, half-siblings, sons-in-law, daughters-in-law, grandparents and grandchildren as well as the parents and grandparents of the responder's key professional's spouse and any person living with the responder's key professionals.
- A failure to disclose the above requested affiliations may result in a disqualification of the responder or in a termination of any contract awarded in response to this RFP.
- The following is a list of technical qualifications that will be used when evaluating potential vendors. Respondents will be asked to confirm their qualifications via Appendix A.
 - Cisco Gold Certified Partner
 - HP Gold or Platinum partner
 - Dell Partner Direct Preferred or Premier Partner
 - Panasonic Authorized Reseller Partner
 - EMC² Gold or Platinum Partner
 - Comm Vault Value-Added Reseller
 - Symantec Gold or Platinum Partner

- VMware Enterprise or Premier Partner
- Microsoft Gold or Silver Certified Partner
- Authorized Microsoft Dynamics Partner and Solution Provider
- Microsoft Cloud Solution Provider (CSP) Partner
- Citrix Gold Solutions Advisor or Platinum Solutions Advisor
- NetApp Platinum or Star Partner
- Three year or greater licensing and support term
- Azure Cloud Readiness Assessment offering available
- Azure Cloud Migration Services offering available
- Azure Expert Managed Services Provider (MSP)
- AWS Partner (AWS MSP Partner, AWS Competency Partner or, AWS Service Delivery Partners and AWS Service Ready Partners)
- Apple Authorized Service Provider
- Consultative feedback on an ongoing basis
- History of working with pension fund desirable

V. Proposal Content

At a minimum, the proposal must include the following information to be considered for the engagement. For ease of review, each requirement should be addressed separately. All communications regarding this RFP must include the RFP ID shown on the title page.

Indexed Table of Contents

The proposal package must include an indexed table of contents to facilitate the review process.

Cover Letter

SURS holds trustees, employees, and vendors to the strongest standards of ethics, transparency, and accountability. Trustees, employees and vendors are prohibited from self-dealing and are required to provide services for the sole interest of SURS members with honesty and integrity at all times. The identification and disclosure of actual or perceived conflicts of interest is integral to ensuring that SURS administers the benefits promised to members in a financial and fiducially-prudent manner. Informational disclosures pertaining to perceived or actual conflicts of interest must be included as part of the cover letter required under this section.

A cover letter in the form of a standard business letter must be signed by an individual authorized to bind the responder contractually. This cover letter must indicate the signer is so authorized and must indicate the signer's title or position. An unsigned proposal will be rejected. The cover letter must also include:

- A. A statement that the proposal meets all requirements of this RFP, and that the offer tendered by the proposal will remain in full force and effect until and may be accepted by SURS at any time prior to 30 days beyond the deadline for submittal.
- B. A disclosure of:
 - 1. Any current or previous personal, business or employment relationships with SURS, any member of the SURS Board of Trustees, any member of SURS staff, any party or vendor currently rendering services to SURS, or any immediate family members of any person included in any of these groups.
 - 2. Any current negotiations for prospective business with SURS, any member of the SURS Board of Trustees, any member of the SURS staff, any party or vendor currently rendering services to SURS, or any immediate family members of any person included in any of these groups.
- C. A statement that the responder knows of no conflict of interest or ethical concern that exists between the responder and SURS, members of the SURS Board of Trustees, any member of SURS staff and/or any immediate family members living with any person included in any of these groups and with any party currently rendering services to SURS. However, if any such conflict or ethical concern exists, the cover letter must contain a detailed statement identifying any such conflicts of interest or other ethical concerns between SURS and anyone affiliated with SURS as set forth herein. If the responder is unsure as to whether a conflict of interest or ethical concern exists, responder is hereby instructed to identify the situation in the cover letter so SURS can determine whether there is cause for concern or cause for further inquiry into the identified situation.
- D. A statement that the responder is not listed as a prohibited or suspended vendor with the state of Illinois, a retirement system, pension fund, investment board, or any other state or federal government entity. Responder must also verify this information in Appendix G.
- E. A statement that the responder acknowledges that all documents submitted in response to this RFP may be subject to disclosure under the Illinois Freedom of Information Act and/or the Illinois Open Meetings Act.
- F. A failure to include the information required in the cover letter as outlined in this section may be cause for disqualification from the RFP selection process and/or cause for termination of an awarded contract.

Statement of Minimum Qualifications

Responders must complete and return the Minimum Qualifications Certification in the form contained in Appendix A.

Reference checks will be conducted for each finalist.

Company Organization and Diversity Questionnaire

The questionnaire contained in Appendix B to this RFP must be completed and returned as part of the proposal.

Fee Proposal

Responders must submit a proposal in the format prescribed in Appendix C. Any deviation from the prescribed format may result in the rejection of the proposal. The proposed fee shall include all costs and expenses for providing the services and equipment as described in this RFP, and any agreed-upon extended warranties that are associated with initial installation. Once finalists are selected, fees may be subject to a "best and final" offer process to be determined at the discretion of the System.

The fee proposal must expressly state that the proposed fees and any proposed discount structures are guaranteed for the term of any resulting contract.

Contract

This request for proposal is neither a contract nor meant to serve as a contract. It is anticipated that one of the proposals submitted in response to this RFP may be selected as the basis for negotiation of a contract with the responder. Such a contract is presently contemplated to contain, at a minimum, the terms of the proposal submitted, as finally negotiated and approved by the System. SURS reserves the right to negotiate additions, deletions, or modifications to the terms of proposals submitted. The terms contained in Appendix D, Addendum to Contract, must be agreed to and accepted by the candidate or organization selected to perform the work contemplated by this RFP, unless exceptions are noted as part of the responder's response.

VI. Submission of Proposals

All proposals must be received no later than the deadline stated in the Anticipated Timeline and Contact Information section. Submissions must be made via email to the identified contact person by the stated deadline. Only email submissions will be accepted.

The proposals become the property of SURS upon submission. All costs for developing proposals and attending presentations and/or interviews are entirely the responsibility of the responder and shall not be chargeable to SURS.

Only one proposal from an individual, firm, partnership, corporation, or combination thereof, will be considered for this assignment.

VII. Evaluation Process

Pre-Evaluation Review

All proposals will be reviewed to determine if they contain all the required submittals specified in this RFP. Those not submitting all required information in the prescribed format will be rejected.

Proposal Evaluation

All proposals received by the SURS representative on or before the deadline listed above will be reviewed to determine whether they meet the minimum requirements of this RFP.

All proposals that are received by the deadline and pass the pre-evaluation review will undergo an evaluation process conducted by SURS staff. They will be reviewed to determine whether they meet the requirements of this RFP. SURS will consider the following factors in the evaluation process, ranked in no specific order, and will render a decision based on the perceived best fit and best value for the engagement. Fees will be one of the determining factors in this decision but will not be the primary determinative. Proposals will be evaluated based on criteria including:

- Understanding of the services requested.
- Timeline for recommended solution to be implemented.
- Proposed methodology and work plan to be used in the process.
- Proposed deliverables.
- Relevant knowledge, experience and qualification of firm and team members including established record of success in similar work.
- Commitment to diversity.
- Willingness to negotiate contract terms.
- Independence.
- Cost.
- Warranty.
- References.
- Adherence to RFP submission requirements.
- Adherence to the Cover Letter requirements pertaining to the disclosure of potential conflicts of interest and ethical concerns and completion of all

appendices, including but not limited to Appendix F that relates to potential conflicts.

- Breadth and quality of products/services.
- Service, support, product warranty and maintenance.
- Financials, i.e. pricing and terms that provide for increased discounts and lower overall cost, rebates, other financial incentives.
- Administration, i.e. reporting capabilities.
- Order placement/delivery/installation.
- On-line capabilities, including electronic ordering, e-commerce, procurement cards, billing and access to supplier's electronic catalogs.
- Environmentally sustainable products and Green Purchasing/Sustainability initiatives.
- Added value incentives and services.
- Other information as deemed relevant by SURS.

Proposals that contain false or misleading statements or that provide references which do not support an attribute or condition claimed by the responder will be rejected. Issuance of the request for proposal creates no obligation to award a contract or to pay any costs incurred in the preparation of a proposal. Nothing in this RFP or any resulting contract shall preclude SURS from procuring services similar to those described herein from other sources.

During the evaluation process, responders may be requested to provide additional information and/or clarify the contents of their proposal. Other than information requested by SURS, no responder will be allowed to alter the proposal or add new information after the filing date.

Once finalists are selected, fees may be subject to a "best and final" offer process to be determined at the discretion of SURS.

Any responder selected by SURS will be subject to the terms of the SURS Travel Policy which are attached hereto as "Appendix E." Responders should be familiar with these terms as they will be included in any contract awarded by SURS. Responders may either include all expected travel costs as part of their overall "not to exceed" cost for the work to be performed under this RFP or they must provide their best estimate for all travel expenses they expect to incur in performing the services required by this RFP.

VIII. Anticipated Timeline and Contact Information

Schedule	Dates
Quiet Period Begins	Jan. 5, 2024, or before
RFP Issued	Jan. 5, 2024, or before
Responder Questions Due	Jan. 19, 2024, 4:30 p.m. CT
Responses to Questions	Feb. 5, 2024, 4:30 p.m. CT
RFP Responses Due on or Before	Feb 16, 2024, 4:30 p.m. CT
Evaluations and Interviews	Feb. 19 – 29, 2024
Selection Committee	Mar. 1, 2024
Anticipated Contract Start Date	Apr. 1, 2024

SURS may extend these deadlines at its discretion. Any such extensions will be posted to the SURS website.

SURS RFP Contact Information

Procurement Officer Procurement_Officer@surs.org
SURS
1901 Fox Drive
Champaign, IL 61820

IX. Submission Process

Deadline

To be considered for selection, proposals must be received via email in Adobe Acrobat format at Procurement_Officer@surs.org no later than 4:30 p.m. CT, Feb 16, 2024. Please reference "60-24-03 Information Technology Software, Hardware, Services and Solutions RFP Response" with the name of the responder in the subject line of your communications. An email confirmation will be sent confirming receipt of the proposal.

Withdrawal

A proposal may be withdrawn any time prior to the deadline by written notification signed by the individual applicant or authorized agent of the firm and received at Procurement_Officer@surs.org no later than the deadline of 4:30 p.m. CT, Feb 16, 2024. Please reference "60-24-03 Information Technology Software, Hardware, Services and Solutions RFP Response" with name of responder in the subject line of your communications. An email confirmation will be sent confirming withdrawal of the

proposal. The proposal may be resubmitted with any modifications no later than the deadline. Modifications offered in any other manner will not be considered.

Questions

To clarify any issues in this request for proposal, SURS will respond only to questions that are presented in writing via email to Procurement_Officer@surs.org. All questions should be submitted to SURS by 4:30 p.m. CT, Jan. 19, 2024. Please reference "60-24-03 Information Technology Software, Hardware, Services and Solutions RFP Response" with the name of the responder in the subject line of your communications. These questions will be consolidated into a single Q&A document and responded to by SURS on or about, Feb. 2, 2024, by 4:30 p.m. CT. The Q&A document will be posted on the SURS web site at www.surs.org/rfp-non-investment. This document will include all questions received and SURS' answers to the same without indicating the source of the query.

X. General Conditions

FOIA Disclosure, Redacted RFP Response, BAFO Requirement & Cyber-Security Training Requirement

All materials submitted in response to the RFP become property of SURS. Proposals remain confidential during the selection process. However, upon completion of the selection process, all responses and documents following or associated therewith, including Best and Final Offers (BAFOs), if any, and including those of the individual, vendor or firm selected, become public information and are open to public inspection in accordance with the state of Illinois Freedom of Information Act (FOIA).

If, in any document submitted in response to this RFP, the responder is furnishing trade secrets or commercial or financial information under a claim that they are proprietary, privileged or confidential and that disclosure of the trade secrets or commercial or financial information would cause competitive harm to the responder or responder's business, such claim must be clearly made, and such information must be clearly identified. (5 ILCS 140/7 and 7.5) Responses to this RFP with every page marked as proprietary, privileged or confidential will not satisfy this requirement and will not be honored. Bidders are required to make a good faith attempt to properly identify only those portions of the response that are truly furnished under a claim that they are proprietary, privileged or confidential and that disclosure of the trade secrets or commercial or financial information contained within that portion of the response would cause competitive harm to the person or business responding to this RFP.

Redacted Version of RFP Response

In the event the responder believes and claims that certain materials or information contained in the submitted response and any documents which may follow it, including BAFOs, if any, are exempt from public disclosure under the Illinois FOIA, the responder is required to provide a separate redacted version of the response (including all its appendices or attachments) that the responder believes will be suitable for release under the Illinois Freedom of Information Act. (5 ILCS 140/7 and 7.5) Note: Pricing and fee structures are generally disclosable under FOIA. If the responder claims that any fee or pricing information qualifies for an exemption under FOIA, the responder must submit its legal analysis, citing applicable Illinois exemption(s) along with the redacted version of its RFP response.

However, any claim of privilege from disclosure is not definitive. SURS has the right and legal obligation to determine whether such information is exempt from disclosure under the Illinois Freedom of Information Act and no information will be considered or determined by SURS to be proprietary, privileged or confidential unless it is identified and separated as indicated herein. (5 ILCS 140/7 and 7.5)

A responder's failure to provide a redacted version of the RFP material, including but not limited to any subsequent BAFOs will result in SURS disclosing the responder's entire RFP response if the same is requested under the Illinois freedom of information act, and neither the responder nor any third parties shall have any recourse against SURS for its disclosure of the non-redacted RFP response.

Ordinary Course of Business Communications Allowed

Other than existing normal business matters, responders, potential responders, or their representatives should not contact anyone at SURS (including SURS staff, members of the SURS board, SURS consultants, attorneys and current vendors) other than the listed RFP contact. In addition, responders must not discuss this RFP with any employee of SURS, trustee of SURS, employee of SURS' custodian, managers, legal counsel, or other advisors or persons/entities having contracts or other affiliations with SURS.

SURS Quiet Period Policy

Please note the following Quiet Period Policy establishing guidelines by which the SURS Board of Trustees and SURS staff will communicate with prospective vendors or service providers during a search process. The quiet period for this RFP began on the date the RFP was issued: Jan. 5, 2024.

1. The quiet period shall commence upon committee action (or board action if the selection is not initiated through a committee) to authorize a search for a service provider and end once a selection has been made by the board and accepted by the service provider.

2. Initiation, continuation and conclusion of the quiet period shall be publicly communicated via the SURS website (www.surs.org) to prevent inadvertent violations.
3. All board members, and SURS staff not directly involved in the search process, shall refrain from communicating with potential service providers regarding any product or service related to the search offered by the provider throughout the quiet period and shall refrain from accepting meals, travel, hotel, or other items of value from the providers.
4. Throughout the quiet period, if any board member or SURS staff member is contacted by a potential service provider, the board member or SURS staff member shall refer the provider to the SURS staff member directly involved in the search process.
5. All authority related to the search process shall be exercised solely by the relevant Committee or board as a whole, and not by individual board members.
6. All information related to the search process shall be communicated by SURS staff to the relevant Committee or board as a whole, and not to individual board members.
7. The quiet period does not prevent board approved due diligence, client conference attendance, or communications with an existing service provider that happens to be a provider in the ordinary course of services provided by such service provider; however, discussions related to the pending selection shall be avoided during those activities.
8. The provisions of this policy will apply to potential service providers throughout the quiet period and shall be communicated to providers in conjunction with any competitive proposal process.
9. A potential service provider or vendor may be disqualified from a search process for a violation of the quiet period or any portion of this policy.

Rights Reserved

SURS reserves the right to amend any segment of the RFP prior to the announcement of a selected responder. In such an event, all responders will be afforded the opportunity to revise their proposals to accommodate the RFP amendment.

SURS reserves the right to remove any or all services from consideration for this contract. At its discretion, SURS may issue a separate contract for any service or groups of services included in this RFP. SURS may negotiate additional provisions to the contract awarded pursuant to this RFP.

SURS may request additional information from any or all bidders to assist in the evaluation of proposals, and SURS reserves the right to conduct background investigations of selected individuals or firms prior to awarding a contract under this RFP.

SURS does not bear any obligation to complete the RFP process or to select any individual(s) or firm(s). SURS also reserves the right without prejudice to reject any or all proposals submitted.

SURS will not reimburse any expenses incurred in responding to this RFP.

Equal Opportunity

SURS does not discriminate because of race, color, religion, creed, sex, sexual orientation, age, marital status, military status, certain unfavorable discharges from military service, political affiliation, citizenship, ancestry, national origin, physical or mental handicap or disability or any other characteristic protected by law. It is the System's intent to comply with all state, federal and local equal employment and opportunity laws and public policies.

Terms and Conditions

Following a review of submitted materials, if requested, selected individuals or organizations must be prepared to make a presentation or otherwise participate in an in-person interview in Champaign, IL or in Chicago, IL with SURS staff members and/or members of the SURS Board of Trustees at a date and location to be determined by SURS. SURS will not provide reimbursement for any costs incurred by the individuals or organizations associated with this presentation. Prior to the award of a contract pursuant to this RFP, selected individuals or firms must provide all requested documentation.

State Universities Retirement System requires contractors that have access to the SURS network and/or applications to complete SURS-provided cyber security training before performing any work for SURS, and annually thereafter, as long as said contractors continue to have access to the SURS network and/or applications.

Appendix A: Statement of Minimum Qualifications

Firm Name: _____

certifies that it meets the following minimum qualifications.

Attach a minimum of two project references, similar in design and scope.

Attach proof of limits of insurance coverage for professional liability insurance and other insurance policies that would provide coverage for work performed on behalf of SURS.

Please initial each item applicable to your organization.

- _____ 1. The responder's key professionals and/or organization has no material conflicts with the SURS board *
- _____ 2. Cisco Gold Certified Partner
- _____ 3. HP Gold or Platinum partner
- _____ 4. Dell Partner Direct Preferred or Premier Partner
- _____ 5. Panasonic Authorized Reseller Partner
- _____ 6. EMC² Gold or Platinum Partner
- _____ 7. Comm Vault Value-Added Reseller
- _____ 8. Symantec Gold or Platinum Partner
- _____ 9. VMware Enterprise or Premier Partner
- _____ 10. Microsoft Gold or Silver Certified Partner
- _____ 11. Microsoft Cloud Solution Provider (CSP) Partner
AWS Partner (AWS MSP, AWS Competency Partner or, AWS Service Delivery Partner and AWS Service Ready Partner)
- _____ 12. Apple Authorized Service Provider
- _____ 13. Citrix Gold Solutions Advisor or Platinum Solutions Advisor
- _____ 14. NetApp Platinum or Star Partner
- _____ 15. Three year or greater licensing and support term
- _____ 16. Azure Cloud Readiness Assessment offering available
- _____ 17. Azure Cloud Migration Services offering available
- _____ 18. Consultative feedback on an ongoing basis
- _____ 19. History of working with pension fund desirable
- _____ 20. PureStorage Partner
- _____ 21. Microsoft Cloud Solution Provider (CSP) Partner
- _____ 22. Microsoft Cloud Solution Provider (CSP) Partner

*** Indicates Mandatory Qualification**

Signed: _____ Date: _____

Title: _____

Appendix B: Company Organization and Diversity Questionnaire

The following questionnaire must be completed and included with your response to this RFP. Type your responses in the same order as the questionnaire, listing the question first followed by your answer.

Contact and Company Information

Name of Individual/Organization: _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Fax: _____

Federal Employer Identification Number: _____

Contact Person(s)

Name: _____

Title: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Organization Background

1. Please provide a general description and history of the organization, its operations (please include any history of mergers and/or acquisitions), year founded, ownership

structure, biographies of the principals and percentage ownership by current employees.

2. Provide a brief, descriptive statement detailing evidence of the responder's ability to deliver the goods or services sought under this RFP.
3. Is responder a "minority-owned business," meaning a business which is at least 51% owned by one or more minority persons, or in the case of a corporation, at least 51% of the stock in which is owned by one or more minority persons; and the management and daily business operations of which are controlled by one or more of the minority individuals who own it? If so, please provide a detailed explanation.
4. Is responder a "female-owned business," meaning a business which is at least 51% owned by one or more females, or, in the case of a corporation, at least 51% of the stock in which is owned by one or more females; and the management and daily business operations of which are controlled by one or more of the females who own it? If so, please provide a detailed explanation.
5. Is responder a "business owned by a person with a disability," meaning a business that is at least 51% owned by one or more persons with a disability and the management and daily business operations of which are controlled by one or more of the persons with disabilities who own it? A not-for-profit agency for persons with disabilities that is exempt from taxation under Section 501 of the Internal Revenue Code of 1986 is also considered a "business owned by a person with a disability." If so, please provide a detailed explanation.
6. Does responder's firm/company have a formal diversity and inclusion policy or initiative? Does this policy extend to subcontractors? If so, please provide a copy of the same.
7. Does responder's firm/company have a formal mentorship program or offer enhanced training opportunities for minorities and/or women? If so, please provide details.
8. If selected, does responder expect to assign any female employees, minority employees, or employees with disabilities to provide any of the requested services to SURS? Please explain.

Appendix C: Fee Proposal

Please include details regarding scope and cost of services, deliverables and timeframe for completion of the project.

Firm Name: _____

Address: _____

Telephone: _____

Representative: _____

1. Appendix H: Technology Products and Services
 - a. Template for pricing information (required) – Software and Hardware pricing to be shown as fixed discount percent off Manufacturer List Price, or any other widely verifiable base cost.
 - b. Services pricing to be shown as hourly rates.
 - c. Maintenance pricing to be shown with monthly and annual rates, in addition to multi-year rates/discounts if they are available.
2. Appendix I: Products and Services of Prime Interest
 - a. Provide pricing for products and services within each Lot supported by your firm.
 - b. Software and Hardware pricing to be shown as fixed discount percent off Manufacturer List Price, or any other widely-verifiable base cost.
 - c. Services pricing to be shown as hourly rates.
 - d. Maintenance pricing to be shown with monthly/annual rates.
3. Proposals must include a full description of each service offering. Services may include but not limited to installation/de-installation, staging/deployment, asset tagging, image loading, maintenance, support, training, migration, integration, asset management, recycling/disposal, pre-implementation design, disaster recovery planning and support, helpdesk, technical support.

Indicate project duration and frequency of visits below.

Cost for additional meetings, if requested by SURS: \$ _____

Please check and complete one of the following statements as it pertains to travel related expenses:

____ The above costs include all expected travel expenses and said expenses will not be billed separately to SURS.

____ The above costs do not include all expected travel expenses and said expenses will be billed separately to SURS in compliance with the SURS Travel Policy attached hereto as "Appendix E."

Responder has read the SURS Travel Reimbursement Policy attached hereto as "Appendix E" and estimates that travel expenses to be incurred for work to be performed relative to this RFP per the terms of said policy will total an amount not to exceed: \$ _____.

I, _____, a licensed operator in the state of Illinois and an authorized representative of the above-indicated firm, have reviewed and understand the _____ Request for Proposals, and I/we am/are prepared to provide the required services for the above costs.

Appendix D: Addendum to Contract

In consideration of SURS entering into such contract, the responder also agrees to the following:

1. If the responder is an individual, he or she certifies that he or she is not in default on an educational loan as provided in Section 3 of the Educational Loan Default Act, 5 ILCS 385/3.
2. The responder certifies that it is not barred from being awarded a contract or subcontract because of a conviction or admission of guilt for bribery or for bribing an officer or employee of the state of Illinois or any other state in that officer or employee's official capacity as provided in Section 50-5 of the Illinois Procurement Code, 30 ILCS 500/50-5 and further certifies that it is in compliance with Section 50-37 of the Illinois Procurement Code, 30 ILCS 500/50-37.
3. The responder certifies that it will provide a drug free workplace by engaging in the conduct prescribed in Section 3 of the Drug Free Workplace Act, 30 ILCS 580/3.
4. The responder certifies that it is not barred from contracting with SURS because of a violation of either Section 33E-3 (bid-rigging) or 33E-4 (bid rotating) of Article 33E of the Criminal Code of 1961, 720 ILCS 5/33E.
5. The responder certifies that neither it nor any substantially owned affiliated company is participating or shall participate in an international boycott in violation of the provisions of the U.S. Export Administration Act of 1979 or the regulations of the U.S. Department of Commerce promulgated under that Act.
6. The responder certifies that no fees, commissions, or payments of any type have been or will be paid to any third party in connection with the contract to which this is an addendum, except as disclosed in the contract or an exhibit thereto as provided in 30 ILCS 500/50-25 and in 40 ILCS 5/1-145. The responder shall promptly notify SURS if it ever has reason to believe that this certification is no longer accurate.
7. To the extent Illinois law is applicable to the responder, pursuant to 775 ILCS 5/2-105, the responder agrees to:
 - a. Refrain from unlawful discrimination and discrimination based on citizenship status in employment and undertake affirmative action to assure equality of employment opportunity and eliminate the effects of past discrimination.
 - b. Comply with the procedures and requirements of the Illinois Department of Human Rights' regulations concerning equal employment opportunities and affirmative action.
 - c. Provide such information, with respect to its employees and applications for employment, and assistance as the Illinois Department of Human Rights may reasonably request.

- d. Have written sexual harassment policies that shall include, at a minimum, the following information:
 - i. The illegality of sexual harassment.
 - ii. The definition of sexual harassment under state law.
 - iii. A description of sexual harassment, utilizing examples.
 - iv. The responder's internal complaint process, including penalties.
 - v. The legal recourse, investigative and complaint process available through the Illinois Department of Human Rights and the Illinois Human Rights Commission.
 - vi. Directions on how to contact the Illinois Department of Human Rights and the Illinois Human Rights Commission.
 - vii. Protection against retaliation as provided by Section 6-101 of the Illinois Human Rights Act. A copy of the policies shall be provided to the Illinois Department of Human Rights upon request.
8. To the extent it applies to the responder and this contract, the responder agrees to comply with the Illinois Prevailing Wage Act, 820 ILCS 130/1, *et seq.*
9. The responder shall maintain, for a minimum of five (5) years after the completion of the contract, adequate books, records, and supporting documents to verify the amounts, recipients, and uses of all disbursements of funds passing in conjunction with the contract. The responder shall further make all such books, records, and supporting documents related to the contract available for review and audit by the internal auditor of SURS and by the Illinois Auditor General and shall cooperate fully with any audit conducted by the internal auditor of SURS and the Illinois Auditor General and will further provide the internal auditor of SURS and the Illinois Auditor General full access to all relevant materials.
10. The responder agrees to notify the SURS ethics officer if it solicits or intends to solicit for employment any of the employees of SURS during the term of the contract.
11. The responder understands that SURS and this contract are subject to the provisions of the Illinois Open Meetings Act (5 ILCS 120/1, *et seq.*) and the Illinois Freedom of Information Act (5 ILCS 140/1, *et seq.*).
12. If Contractor is a vendor that receives access of any kind to the SURS network or to any component of the SURS computer systems to perform work contemplated under the Agreement to which this Addendum is attached, contractor agrees that its employees and/or pre-approved subcontractors who will be performing work for SURS will complete designated cybersecurity training required by SURS before any such work shall commence.

13. Data Location. If the agreement with SURS involves the access and/or storage of SURS Personal Identifiable Information (“PII”) data, vendor shall provide its services to SURS and its end users solely from data centers located in the United States of America. Storage of SURS PII data at rest and all backups shall be located solely in data centers located in the United States of America. Vendor shall not allow its personnel or pre-approved subcontractors to store SURS’ PII data on any portable devices, including personal computers, tablets, or cell phones, except for devices that are used and permanently stored at all times only at its United States of America data centers. Vendor shall permit its personnel and SURS pre-approved subcontractors to access SURS’ PII data remotely only as required to provide technical support or as authorized in writing, by SURS.
14. Data Security. If vendor has access to SURS PII data held or maintained by SURS, vendor must maintain reasonable security measures to protect those records from unauthorized access, acquisition, destruction, use, or disclosure pursuant to 815 ILCS 530/45. Vendor agrees to email a written notification within 24 hours of any verified security incidents or breaches involving SURS PII relating to the vendor’s corporate or customer environments, applications, or systems and/or of any security incidents or breaches involving any of its subcontractors.
15. Counterparts. This Agreement and Addendum may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement. The counterparts of this Agreement and Addendum may be executed and delivered by facsimile or other electronic signature by any of the parties to any other party and the receiving party may rely on the receipt of such document so executed and delivered by facsimile or other electronic means as if the original had been received.

Under penalties of perjury, the responder certifies that _____ is its correct Federal Taxpayer Identification Number.

Responder is doing business as a(n) (please circle applicable entity):

Individual

Sole Proprietorship

Partnership

Corporation

Not-for-Profit Corporation

Medical and Health Care Services Provider Corporation

Real Estate Agent

Governmental Entity

Tax Exempt Organization (IRC 501(a) only)

Trust or Estate

Other: _____

Appendix E: SURS Travel Policy

SURS Travel Reimbursement Policy Terms for Approved Travel Expenses of Vendors

If the responder's personnel are required to travel to perform work on behalf of SURS, any reimbursement for said travel expenses will be as allowed, in part, by the travel requirements outlined by the Illinois Higher Education Control Board as found in Title 80, Public Officials and Employees, Chapter 4, Travel Regulation Counsel, Part 3000, Illinois Administrative Code as noted below. Accordingly, any expected travel must be pre-approved by SURS and said travel reimbursements will be restricted to the following:

NOTE: Actual cost receipts for the same must be provided before SURS may reimburse travel expenses.

Travel by Air

SURS will reimburse travel expenses for airfare at the price of a standard coach ticket. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Travel by Rail

SURS will reimburse travel expenses for train travel at the price of a standard coach ticket. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Travel by Automobile

Rental Cars — SURS will reimburse travel expenses for the use of a rental car at the rate of \$60.00 per day. The collision damage waiver and personal accident insurance on rented vehicles are not reimbursable. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Private Vehicles — Mileage Reimbursement: If an individual chooses to drive a private vehicle, reimbursement for use of a vehicle shall be on a mileage basis and shall be at the applicable rate identified by the Illinois Higher Education Travel Control Board which is

based on the rate promulgated pursuant to 5 USC 5707(b)(2) in effect at the time of travel. All travel must be via the most direct route. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Hotel Accommodation

SURS will reimburse hotel expenses at a maximum rate of \$150.00 per day. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Per Diem for Meals

SURS will pay a maximum of \$45 per day for a full day of per diem meal reimbursements with limits of \$10 for breakfast, \$10 for lunch and \$25 for dinner. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Appendix F: Conflict of Interest Identification

SURS holds trustees, employees and vendors to the strongest standards of ethics, transparency, and accountability. Trustees, employees and vendors are prohibited from self-dealing and are required to provide services for the sole interest of SURS members with honesty and integrity at all times. The identification and disclosure of conflicts of interest is integral to ensuring that SURS administers the benefits promised to members in a financial and fiduciarily-prudent manner.

All responders are required to fill out the information below. A failure to disclose any material conflict as outlined in this section may be cause for disqualification from the RFP selection process and/or cause for termination of an awarded contract. Please respond to each question below by initialing the space next to the appropriate answer and completing the certification.

Does the organization and/or any of its key professionals or their immediate family members have a conflict of interest or ethical concerns that may prevent it from contracting with SURS?

Yes No Unsure

Does the organization and/or any of its key professionals or their immediate family members have a conflict of interest or ethical concerns with any member of the SURS Board of Trustees that may prevent it from contracting with SURS?

Yes No Unsure

Does the organization and/or any of its key professionals or immediate family members have a conflict of interest or ethical concerns with any SURS staff members that may prevent it from contracting with SURS?

Yes No Unsure

If answering "Yes" or "Unsure" to any of the questions above, please explain below:

I hereby certify that the information set forth above is true and complete to the best of my knowledge and belief.

Printed Name: _____ Title/Position: _____

Signature: _____ Date: _____

Appendix G: Prohibited Responder Listing

All responders are required to fill out the information below. A failure to disclose any material conflict as outlined in this section may be cause for disqualification from the RFP selection process and/or cause for termination of an awarded contract.

Is the organization presently listed on a state or federal prohibited responder listing, or a retirement system, pension fund, or investment board prohibited responder listing?

Yes No

Has the organization ever been listed on a state or federal prohibited responder listing, or a retirement system, pension fund, or investment board prohibited responder listing?

Yes No

If answering "Yes" to either of the previous questions, please explain why the organization is/was on the prohibited responder listing, including dates of prohibition.

I hereby certify that the information set forth above is true and complete to the best of my knowledge and belief.

Printed Name: _____ Title/Position: _____

Signature: _____ Date: _____

Appendix H: Technology Products and Services

GENERAL DEFINITION OF PRODUCTS AND/OR SERVICES

Offerors are to propose the broadest possible selection of technology products, services, solutions and related products and services they offer. The intent of this solicitation is to provide SURS with products and services to meet their various needs. A template for providing pricing information is included at the bottom of this Appendix. Therefore, the offerors should have demonstrated experience in providing the products and services as defined in this RFP, including but not limited to:

Technology Products

A complete portfolio of technology products such as desktops, laptops, tablets, PDA's, servers, storage, ruggedized devices, thin clients, printers, monitors, multifunction printers, scanners, plotters, projectors, video conferencing, teleconferencing, analog phones, VoIP phones, conference phones, audiovisual equipment such as computer video interfaces, switchers, matrix switchers, distribution amplifiers, video scalars, scan converters, processing devices Ethernet control interfaces and high resolution cables, instructional equipment, security equipment, cabling, modems, wired and wireless networking, networking to support server, storage and client applications such as routers and switches, software, computer accessories, computer components, power protection, data protection, video cameras, virtualization products, systems and network management tools, database products, data center facilities (racks, fire suppression, electrical, HVAC, generator, physical access controls) as well as any other technology products available from Offeror.

Technology Services and Solutions

A complete portfolio of technology services and solutions such as systems configuration, testing, software copying, hardware and software installation, upgrades and/or maintenance, system integration, network integration, extended warranties, warranty service, staff augmentation and any other services and solutions available from Offeror. Specific requirements will be developed on a task order basis and may include, but is not limited to, services and solutions such as:

- Virtualization: Transform data center with virtualization to consolidate servers, reduce energy consumption, increase IT capacity, add system flexibility and prepare for cloud computing.
- Physical Security: Security solutions seaports, airports, water and wastewater, transportation, critical infrastructure, perimeter defense, physical and logical access control, identity management, antiterrorism protection, automated alarms and alerts, integration with databases containing critical security information,

cyber security and asset management, endpoint security and other network security and IT security.

- Communications: Communication solutions to converge voice, data and video communications onto a single, secure IP-based network.
- Cloud: Cloud solutions for scalable computing and storage capacity and rapid self-provisioning computing capabilities. This may include, but is not limited to, Cloud Infrastructure as a Service (IaaS), Cloud Software as a Service (SaaS) and Cloud Platform as a Service (PaaS).
- Infrastructure: Infrastructure solutions such as data center management, network modernization and migration, desktop virtualization, risk and vulnerability management, and IT service management.
- Data Management: Data management solution which uses technologies such as thin provisioning, de-duplication and automated storage tiering to improve storage utilization.
- Visual Communications: Visual communications that integrate audio, video, voice and presentation capabilities.
- UCC (Unified Communications and Collaboration): UCC video teleconferencing solutions that provide for critical infrastructure, emergency operations centers, command rooms, fusion centers, training rooms and classrooms.
- Broadcast Studio: Broadcast studio solutions for staff that oversee communications and public broadcast efforts which provide integration (system design engineering), fabrication, budgeting, scheduling, engineering, architectural planning (technical grounding, power distribution and facility load requirements), and equipment specification (video, audio, network and storage technologies).
- Mobility: Mobility services to keep users connected, responsive and secure such as email protection, download prevention, containerize content on devices, self-destructing content and content linked back to the user.
- Asset Management: Asset management solutions to identify and manage installed software, hardware and license entitlements.
- Data Protection: Data protection to protect, backup, recover and archive data and applications.
- Financial Services: Financing options such as lease, lease to own, lease with option to own and IT as a service.
- Other Services and Solutions: Services and solutions not listed above that may be proposed by offeror.

Acer Products, Services and Solutions

A complete offering of product, services and business solutions offered by Acer.

Adobe Products, Services and Solutions

A complete offering of product, services and business solutions offered by Adobe.

Amazon Web Services Products, Services and Solutions

Amazon Web Services Products and Services: A complete offering of Amazon Web Services products and services including, but not limited to, global compute, storage, database, analytics, application and deployment services to power web and mobile applications, data processing and warehousing, storage and archive, as well as any other products and services offered by Amazon Web Services.

Amazon Web Services Solutions: A complete offering of Amazon Web Services solutions including, but not limited to, cloud based solutions for websites, backup and recovery, archiving, disaster recovery, development and test, big data, high performance, databases, digital marketing, e-commerce, media and entertainment, mobile services, internet of things, enterprise IT, business applications, content delivery, health and any other solutions offered by Amazon Web Services.

Apple Products, Services and Solutions

A complete offering of Apple products, services and solutions including, but not limited to, MacBook, MacBook Air, MacBook Pro, iMac, Mac Pro, Mac Mini, iPad Mini, iPad, iPhone, Apple Watch, iPod, Apple TV, accessories for all products, apps, servers, music, support and any other products, services or solutions offered by Apple.

Cisco Products, Services and Solutions

Cisco Products: A complete offering of Cisco products including, but not limited to, application networking services products, blade switches, cloud and systems management, collaboration endpoints, conferencing, connected safety and security, customer collaboration, data center management and automation, data center switches, infrastructure software, interfaces and modules, networking software, optical networking, routers, security, servers, service exchange, storage networking, switches, unified communications, video, wireless, and any other products offered by Cisco.

Cisco Services and Solutions: A complete offering of Cisco services and solutions including, but not limited to, cloud and systems management services, collaboration services, collaboration endpoints services, conferencing services, data center and virtualization services, enterprise network services, routing services, security services,

services for application networking services, storage networking services, switching services, unified communication services, unified computing services, video services, wireless services and any other services and solutions offered by Cisco.

Citrix Products, Services and Solutions

Citrix Products: A complete offering of Citrix products, including but not limited to, Workspace Suite, Workspace Cloud, GoToMeeting, GoToTraining, GoToWebinar, OpenVoice, Podio, receiver for universal access from any device, XenMobile, ShareFile, Worx Mobile Apps, GoToAssist, Concierge, XenApp, XenClient, XenDesktop, NetScaler, CloudBridge, CloudPlatform, XenServer, CloudPortal Business Manager and any other products offered by Citrix.

Citrix Services and Solutions: A complete offering of Citrix services and solutions including, but not limited to, application and desktop virtualization, enterprise mobility management, file sync and sharing, cloud networking, collaboration, cloud services and any other services and solutions offered by Citrix.

CommVault Products, Services and Solutions

CommVault Products: A complete offering of CommVault software including Simpana software, but not limited to, backup and recovery, virtual machine, integration, replication, OnePass Backup and Archive, deduplication, reporting and insights, workflow automation, content-based retention, self-service access, search and eDiscovery, legal hold, ContentStore, and any other products offered by CommVault.

CommVault Solutions, Services and Support: A complete offering of CommVault solutions, services and support including, but not limited to, data and information management, enterprise applications, bundled appliances, solutions for specialized industries such as healthcare, government and education, consulting services, professional services, support and training and any other solutions, services and support offered by CommVault.

Dell Products, Services and Solutions

Dell Products:

- General Products: A complete offering of Dell products including, but not limited to, laptops, notebooks, PDA's, desktops, workstations, thin clients, monitors, servers, accessories, battery back-up, power or surge, cables, data storage and drives, networking, digital imaging such as cameras and scanners, memory and

system components, office equipment, sound and multimedia, telecommunications products, video monitors, cards and projectors, interactive whiteboards, DVD's, books, music and video.

- Software: A complete offering of Dell software including, but not limited to, information management, data protection, data center and cloud management, mobile workforce management, security, platforms and any other software offered by Dell.

Dell Services and Solutions: A complete offering of Dell services and solutions including, but not limited to, support services, application modernization, application services, business process outsourcing, digital business services, cloud-based services, information security services, financing and leasing, IT consulting, managed services, training services, cloud solutions, data center solutions, security solutions, big data, information and data management, mobility and security solutions and any other services and solutions offered by Dell.

EMC² Products, Services and Solutions

EMC² Products:

- Big Data: A complete offering of EMC² Big Data products including, but not limited to, storage, analytics, applications and any other Big Data products offered by EMC².
- Cloud: A complete offering of EMC² cloud products including, but not limited to, applications, data protection, infrastructure, security, cloud enabled solutions and any other cloud products offered by EMC².
- Convergent Infrastructure: A complete offering of EMC² convergent infrastructure products including, but not limited to, blocks, racks, appliances, reference architecture and any other convergent infrastructure products offered by EMC².
- Storage: A complete offering of EMC² storage products including, but not limited to, primary storage, software-defined storage, enterprise applications storage, storage for small and medium organizations, data protection products and any other storage products offered by EMC².
- Security: A complete offering of EMC² security products including, but not limited to, authentication, data loss prevention, data protection, fraud prevention, governance, risk and compliance, identity and access management, network analytics, security information and event management, cyber security framework, incident response assistance, and any other security products offered by EMC².

EMC² Services and Solutions:

- Big Data: A complete offering of EMC² Big Data consulting, services and solutions.

- Cloud: A complete offering of EMC² cloud management, support, services and solutions.
- Content Management: A complete offering of EMC² content management services and solutions including, but not limited to, process management, capture, customer communications, collaboration, pervasive governance and any other content management services and solutions offered by EMC².
- Data Protection Solutions: A complete offering of EMC² data protection solutions including, but not limited to, data protection solutions for Oracle, data protection solutions for Microsoft, data protection solutions for SAP, data protection solutions for VMware, data protection solutions for EMC Enterprise Hybrid Cloud, data protection solutions for Big Data, deduplication solutions, desktop, laptop and remote office solutions, disaster recovery solutions, mainframe tape replacement solutions, tape replacement solutions and any other data protection services and solutions offered by EMC².
- Infrastructure Management: A complete offering of EMC² infrastructure management services and solutions including, but not limited to, data center automation, IT operations management, IT performance management, configuration and compliance management, storage resource management, applications performance management, Vblock platform management and any other infrastructure management services and solutions offered by EMC².
- Security: A complete offering of EMC² security services and solutions including, but not limited to, advance security operations, authentication, data loss prevention, fraud prevention, network monitoring and any other security services and solutions offered by EMC².
- General Services and Solutions: A complete offering of any additional EMC² services and solutions including, but not limited to, installation, support, warranties, training, and any other services and solutions offered by EMC².

Fortinet Products, Services and Solutions

A complete offering of product, services and business solutions offered by Fortinet.

Genesys PureCloud Products, Services and Solutions

A complete offering of product, services, support and business solutions offered by Genesys PureCloud.

Google Products, Services and Solutions

A complete offering of Google product, services and solutions including, but not limited to, Apps for work, cloud platform, maps for work, search for work, chrome for work, android for work, Google business solutions and any other products, services and solutions offered by Google.

HP (Inc.) Products

HP Inc. Products: A complete offering of HP products including, but not limited to:

- Computers: Desktops, laptops, tablets, monitors, workstations, accessories, point of sale computers for retail environments, thin client software portfolio, digital signage and any other computer equipment and software available from HP.
- Printers

HP (e) Products, Services and Solutions

HPe Products: A complete offering of HP products including, but not limited to:

- Networking: Data center networking, software-defined networking, switches, wireless networking, campus networking and any other networking available from HP.
- Servers: Blade servers, scalable servers, integrity mission-critical servers, rack and tower servers and any other servers available from HP.
- Software: Application lifecycle management, big data analytics, business service management, enterprise security, hybrid cloud management, information governance, information management, IT service management, mobile solutions, operations management, software-defined data center, DevOps solutions and any other software available from HP.
- Storage: Primary storage, backup, recovery and archive storage, enterprise application storage, primary storage, software-defined storage, Simply StoreIT solutions and any other storage available from HP.

HP Services and Solutions: A complete offering of HPe services and solutions including, but not limited to, analytics and data management, applications services, business process services, data center, workload and cloud services, enterprise security services, IT financing and asset recovery services, mobility and workplace services, support services, technology consulting, computing services, big data solutions, cloud solutions, mobility

solutions, security solutions, converged systems solutions, small and midsize organization solutions, total access education solutions, and any other services and solutions offered by HPe.

IBM Products, Services and Solutions

IBM Products:

- General Products: A complete offering of IBM products including, but not limited to, laptops, notebooks, PDA's, desktops, workstations, thin clients, monitors, servers, accessories, battery back-up, power or surge, cables, data storage and drives, networking, digital imaging such as cameras and scanners, memory and system components, office equipment, sound and multimedia, telecommunications products, video monitors, cards and projectors, interactive whiteboards, DVD's, books, music and video.
- Software: A complete offering of IBM software including, but not limited to, information management, data protection, data center and cloud management, mobile workforce management, security, platforms and any other software offered by IBM.

IBM Services and Solutions: A complete offering of IBM services and solutions including, but not limited to, support services, application modernization, application services, business process outsourcing, digital business services, cloud-based services, information security services, financing and leasing, IT consulting, managed services, training services, cloud solutions, data center solutions, security solutions, big data, information and data management, mobility and security solutions and any other services and solutions offered by IBM.

Jabra Products, Services and Solutions

A complete offering of product, services and business solutions offered by Jabra.

KnowBe4 Products, Services and Solutions

A complete offering of product, services and business solutions offered by KnowBe4.

Kofax Products, Services and Solutions

A complete offering of product, services and business solutions offered by Kofax.

Lenovo Products, Services and Solutions

A complete offering of product, services and business solutions offered by Lenovo.

Lexmark Products, Services and Solutions

A complete offering of product, services and business solutions offered by Lexmark.

Logitech Products, Services and Solutions

A complete offering of product, services and business solutions offered by Logitech.

Microsoft Products, Services and Solutions

Microsoft Products:

- Devices: A complete offering of Microsoft devices including, but not limited to, Surface products, PC's and tablets, Xbox, Lumia Phones, Microsoft Band, Microsoft HoloLens, Microsoft Surface Hub, accessories and any other devices offered by Microsoft. □ Software and Apps: A complete offering of Microsoft software and apps, including but not limited to, Office, Windows, other software and services such as Microsoft Health, Microsoft Security Essentials, Skype, Internet Explorer, OneDrive, Outlook, OneNote, Bing, Visual Studio, Visio, Project, and MSN, apps, games, downloads, Developer and IT Pro, Business and Enterprise such as cloud platform, data availability, business analytics, customer relationship management, Enterprise Mobility Suite, Enterprise resource and planning, business software and apps such as Microsoft Dynamics, Microsoft Power BI, Microsoft SQL Server, Windows Server, Microsoft System Center, Visual Studio, Microsoft Azure, Microsoft Social Engagement, Windows Embedded, Microsoft Intune, OneDrive for Business, Exchange Server, SharePoint and any other software and apps offered by Microsoft.

Microsoft Services and Solutions: A complete offering of Microsoft services and solutions including, but not limited to, support, licensing and any other services and solutions offered by Microsoft.

Mimecast Products, Services and Solutions

A complete offering of product, services and business solutions offered by Mimecast.

NetApp Products, Services and Solutions

NetApp Products: A complete offering of NetApp products, including but not limited to, hybrid data storage, software and converged infrastructure, enterprise all-flash data storage, software and converged infrastructure, hardware and software for cloud storage and any other products offered by NetApp. 3.1.17.2. **NetApp Services and Solutions:** A complete offering of NetApp services and solutions to build a cloud-ready data center, accelerate enterprise application performance, protect and recover data, strategy, design, deploy and transition, operations, training, certification, support and any other services and solutions offered by NetApp.

Palo Alto Products, Services and Solutions

A complete offering of product, services and business solutions offered by Palo Alto.

Panasonic Products, Services and Solutions

Panasonic Products:

- Communications: A complete offering of Panasonic communication systems including, but not limited to, business communication systems, HD visual communication systems, IP phones and any other communications products, applications and accessories offered by Panasonic.
- Security Systems: A complete offering of Panasonic security systems including, but not limited to, network cameras, video recorders, interfaces, software and converters, analog cameras, digital video recorders, switchers and controllers, remote head cameras, module cameras, wearable cameras, security viewer application and any other security systems and accessories offered by Panasonic.

- Personal Computers: A complete offering of Panasonic computers including, but not limited to, rugged, semi-rugged and business-rugged Toughbooks and Toughpads and any other personal computers and accessories offered by Panasonic.
- Professional AV: A complete offering of Panasonic professional AV equipment including, but not limited to broadcast and professional AV equipment such as camcorders, camera systems, switchers and mixers, monitors and accessories, visual systems such as projectors, professional displays and accessories, sound systems such as public address systems, infrared wireless microphone systems and RAMSA audio systems and any other professional AV and accessories offered by Panasonic.
- Terminals: A complete offering of Panasonic terminals including, but not limited to, handheld tablets, point of sale workstations and any other terminals offered by Panasonic.
- Soft Module Products: A complete offering of Panasonic soft module products including, but not limited to, audio and video processing software, voice recognition software, image recognition software and any other soft module products offered by Panasonic.
- Recording Media: A complete offering of Panasonic recording media including, but not limited to, SD cards for professional camcorders, SD memory cards for industrial use, blue-ray disc, ADA (advanced disc for archive, DV cassettes and any other recording media offered by Panasonic.

Panasonic Services and Solutions: A complete offering of Panasonic services and solutions including, but not limited to, installation, product configurations, product support, warranties, insurance, railway industry solutions and any other services and solutions offered by Panasonic.

Plantronics Products, Services and Solutions

A complete offering of product, services and business solutions offered by Plantronics.

Proofpoint Products, Services and Solutions

A complete offering of product, services and business solutions offered by Proofpoint.

Quest Products, Services and Solutions

A complete offering of product, services and business solutions offered by Quest.

Samsung Products, Services and Solutions

A complete offering of Samsung products, services and solutions including, but not limited to, Galaxy Tabs, Galaxy Notes, Wi-Fi Tablets, 4G / LTE Tablets, Laptops, Desktops, Chrome Devices, All-in-One PCs, Monitors, Printers, Cell Phones, Wearable Tech, Memory & Storage, Home Theater & Audio, IP Cameras, Security Systems, TVs, accessories for all products, apps, servers, music, support and any other products, services or solutions offered by Samsung.

Symantec Products, Services and Solutions

Symantec Products: A complete offering of Symantec security products including, but not limited to, advanced threat protection, code signing, control compliance suite, data loss prevention, DeepSight security intelligence, email security, encryption, endpoint management (Altiris), internet of things, endpoint protection, incident response, managed security services, mobile security and management, Norton, protection suite, SSL certificates, user authentication and any other security products offered by Symantec.

Symantec Services and Solutions: A complete offering of Symantec services and solutions including, but not limited to, consulting, education services, managed services, support services, appliance services, licensing, technical support, training and certification, threat protection solutions, information protection solutions, cyber security services, enterprise mobility management, and any other services and solutions offered by Symantec.

Veeam Products, Services and Solutions

A complete offering of product, services and business solutions offered by Veeam.

Veritas Products, Services and Solutions

Veritas Products: A complete offering of Veritas Information Management products including, but not limited to, archiving and eDiscovery, backup exec, information fabric

technology platform, InfoScale, NetBackup, NetBackup appliances, storage foundation high availability, system recovery and any other offered by Veritas.

Veritas Services and Solutions: A complete offering of Veritas services and solutions including, but not limited to, consulting, education services, managed services, support services, appliance services, licensing, technical support training and certification, and any other services and solutions offered by Veritas.

VMware Products, Services and Solutions

VMware Products: A complete offering of VMware products including, but not limited to, data center and cloud infrastructure, networking and security, storage and availability, hyper-converged infrastructure, data center and cloud management, personal desktop software, business mobility software, desktop and application virtualization software, enterprise mobility management software and any other products offered by VMware.

VMware Services and Solutions: A complete offering of VMware services and solutions including, but not limited to, cloud computing, software-defined data center, virtualization, business mobility, data center virtualization and hybrid cloud extensibility, streamlined and automated data center operations, application and infrastructure delivery automation, security controls native to infrastructure, high availability and resilient infrastructure, and any other services and solutions offered by VMware.

Template for pricing information (required)

Please provide standard pricing information for supported manufacturer products, services and solutions in a format that is clear, concise and easily understood. Your standard discount should be noted and will be compared across vendor submissions. We realize when a project is identified and registered with the manufacturer, certain circumstances (size of deal, competitive replacement, bundle pricing, etc.) may lead to greater discounts.

Type of Purchase	Manufacturer	Product, Service, or Solution	Rate or Discount%	List any criteria for enhanced pricing, if available	Notes
Hardware					
Software					
Services					

Returns/Restocking					
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Appendix I: Products and Services of Prime Interest

SURS has identified a subset of specific products, software and services that are identified 'of prime interest' with a higher sense of urgency due to upcoming projects. Respondents should provide current pricing for these items based on estimated quantities for purchase, although this is not a guarantee of purchase order. This list is divided into three separate lots. Please follow the pricing guidelines as defined in Appendix C. **This will be used for vendor evaluation.**

SURS recognizes that any one supplier may not provide all product lines within a given lot. Please indicate the lots you are responding to in this portion of the proposal:

___ Lot #1 - Hardware and Hardware Maintenance (including but not limited to: desktops, workstations, laptops, tablets, thin clients, printers and scanners, servers, storage, network devices, peripherals and accessories monitors/displays, memory, docking stations, input devices, storage devices and systems, video projectors, cameras, audio, and headsets).

___ Lot #2 - Software (operating systems, commercial off-the-shelf (COTS), middleware)

___ Lot #3 - Related Services and Support

Lot #1 Hardware and Hardware Maintenance

The following hardware and hardware maintenance items with quantity greater than 1 are targeted for fiscal year 2025 (July 1, 2024 – June 30, 2025). Other items are for comparison purposes and may or may not be purchased in FY 2025.

Qty	Description	Price
15	Lenovo ThinkPad P16s Gen 2 • 16" • Intel Core i7 1370P • vPro 12 Enterprise - 16 GB RAM - 512 GB SSD - English	
15	Lenovo ThinkPad X1 Yoga Gen 8 - 14" - Intel Core i7 1365U Intel Evo vPro Enterprise Platform - 16 GB RAM - 512 GB SSD	
19	Cisco Switches C9200-48PXG-E	
2	Cisco Switches C9300-48T-E	
41	Cisco Switches C9130AXi-B	
1	IBM Tape Library	
7	LTO9 HH Fiber Channel Drive (3555-L3A-AGLA)	
2	TS43002 – LTO7 HH Fiber Channel Drive (3555-E3A-AGKJ)	

Lot #2 Software (licensing, upgrades and maintenance)

Please quote software at latest version/release and service pack.

Qty	Description	Price
Microsoft Licensing and Support (all pricing should be for annual cost unless otherwise specified)		
3	Microsoft Exchange Server - License & software assurance - 1 server - academic - Enterprise, Select, Select Plus, EES - All Languages	
150	Microsoft Exchange Server - License & software assurance - 1 user CAL - Select, Select Plus - Win - All Languages	
15	Microsoft SQL Server Standard Edition - License & software assurance - 1 server - academic - Enterprise, Select, Select Plus, EES - Win - All Languages	
30	Microsoft SQL Server - License & software assurance - 1 device CAL - Campus, School, Enterprise, Select, Select Plus, EES - Win - All Languages	
150	Windows 10 Pro - Upgrade license - 1 license - Select Plus - All Languages	
50	Microsoft Windows Virtual Desktop Access - Subscription license - 1 device - Select, Select Plus, EES - Win - All Languages	
50	Microsoft Windows Remote Desktop Services - License & software assurance - 1 user CAL - Enterprise, Select, Select Plus - Win - All Languages	
8	Microsoft Windows Server Datacenter Edition - License & software assurance - 2 cores - Enterprise - All Languages	
10	Microsoft Windows Server Standard Edition - License & software assurance - 2 cores - Enterprise - All Languages	
150	Microsoft Windows Server - License & software assurance - 1 CAL - academic - Select, Select Plus - All Languages	

10	Microsoft Visual Studio Professional with MSDN - License & software assurance – 1 user - Select, EES - Win - All Languages	
Microsoft 365 Tenant Licenses		
11	Exchange Online (Plan 1) for GCC	
209	Microsoft Office 365 G5 level licenses	
32	Microsoft Entra ID P1 for government	
14	Office 365 G3 GCC	
1	Microsoft Power Automate Premium, for Government	
1	Power BI Pro for Government	
6	Project Plan 3 for GCC	
27	Visio Plan 2 for GCC	
Other Licensing and Software Maintenance		
1	VMWare vSphere support	
8	Veeam Annual Basic Maintenance Backup Replication Phone Support Service	
1	Adobe LiveCycle Designer	
5	Adobe Creative Cloud for Teams	
1	Quest software maintenance for NetVault Smartdisk	
25	Cisco XenDesktop Maintenance	
1	Genesys Licensing and Support	

Lot #3 Services

Items listed in the **Microsoft Services and Support** section are actual projects targeted to be completed within the next 18 months. **System Integration/Implementation Services and Networking Support** are as needed.

Please quote an hourly rate for services such as:

Description	Hourly Rate
System Integration/implementation Services and Networking Support	
Palo Alto Firewall Configuration Assistance	
ISE Configuration and Upgrade Services	
Cisco UCS, Switches, Routers and Wireless Controllers updates & configuration changes	
PureStorage configuration, update and support	
Encryption Assistance	
Genesys Licensing and Support	
Microsoft Services and Support	

Deploy security tools and features for email and other Office 365 workloads to ensure SURS organizational data is protected.	
Assist with implementation of Office 365 Security features	
Office 365 eDiscovery and litigation hold setup and training	