

Information Technology Data Center
Colocation and Wide Area Network Services

Request for Proposal

February 2017



Orange County Employees Retirement System (OCERS)
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Section 1: Introduction

The Orange County Employees Retirement System (OCERS) was established in 1945 under the provisions of the County Employees Retirement Law of 1937, and provides members with retirement, disability, death, and cost-of-living benefits. There are approximately 42,000 members served by OCERS, of which nearly 16,000 are retirees. The Board of Retirement consists of nine members, four of whom are appointed by the County's Board of Supervisors, four who are elected by the active members of OCERS, and one, the County Treasurer, who serves as an ex officio member. There is also one elected alternate member. The Board of Retirement is responsible for establishing policies, regulations and guidelines for the investment of the assets of the pension fund. OCERS has one physical location with approximately 70 employees.

Section 2: Project Background

OCERS recently undertook a project to conduct organization-wide Business Continuity (BC) and Disaster Recovery (DR) planning. As a result of this project, OCERS identified its critical business processes and defined recovery time objectives (RTO) and recovery point objectives (RPO) for those processes. In order to meet these requirements, the OCERS Information Technology Department has architected a secure, robust and resilient information technology infrastructure solution (see *Appendix A: Proposed Topology Overview*) which OCERS would like to implement in 2017. This solution entails relocating OCERS' existing onsite data center to a local, professionally managed colocation facility and configuring a second, geographically distant colocation facility for fault tolerance and high availability that enables OCERS to switch between facilities in the event of a disruption of service.

Section 3: General Information

All terms, conditions, requirements and procedures included in the RFP must be met for a response to be qualified as responsive. A submission that fails to meet any material term, condition, requirement or procedure of this RFP may be disqualified. OCERS reserves the right to waive or permit cure of non-material errors or omissions. OCERS reserves the right to modify, amend, or cancel the terms of the RFP at any time. All responses must be submitted in accordance with the specific terms of this RFP. The submission requirements for this RFP are set forth below. A proposal shall constitute an irrevocable offer for 90 business days following the deadline for submission. Reference to a certain number of days in this RFP shall mean business days unless otherwise specified.

Section 4: Proposed Scope of Services

OCERS requests that vendors submitting proposals provide information, including pricing where applicable, for the following professional services, meeting the defined requirements where specified:

- ▶ A colocation facility which meets or exceeds the Tier III certification level within a 25-mile radius of OCERS headquarters (located at 2223 East Wellington Avenue, Santa Ana, CA 92701).
- ▶ A colocation facility which meets or exceeds the Tier III certification level within a 500-mile radius of OCERS headquarters and that is at least 100 miles from any seismic fault which is historically known to experience magnitude 6.0 or greater activity.
- ▶ Colocation space at each facility to include: (1) dedicated lockable rack (42U minimum height), primary and redundant 30A/208V power circuits, redundant 100 Mbps burstable on 1 Gbps port internet connections and cross-connects. Please include a description of the proposed connectivity technology, including the type and speed of suggested interfaces. If possible, please provide a map of the facility with the general location of the proposed rack space noted on the map.
- ▶ Wide Area Network connectivity: 1 Gbps meshed private connectivity between OCERS headquarters, Orange County data center and secondary data center.
- ▶ A three-year agreement which converts to a month-to-month agreement upon expiration of the initial term.

Vendors should make an effort to note differentiating factors from other potential vendors where possible, to assist OCERS in identifying each vendor's value proposition.

Additionally, proposal submission should include responses to the following questions and requests:

Facility Infrastructure

- 1) What is the total facility square footage?
- 2) How many customers are served from this facility?
- 3) How long has the facility been in operation?
- 4) What is the smallest amount of space dedicated to a single customer? What is the average amount of space utilized by a customer? What is the largest amount of space dedicated to a single customer?
- 5) Describe the loading dock and freight elevation.
- 6) Is secure storage available for new deliveries?
- 7) Describe the secure staging, testing and spare part storage areas in the facility.
- 8) Please describe in detail the power infrastructure and age. Describe incoming power feeds, backup power feeds, generation methods, equipment vendors, planned maintenance activities and monitoring systems. Please provide a detailed one-line diagram.
- 9) Please describe in detail the cooling infrastructure and age. Describe the equipment used. Please provide a detailed one-line diagram.
- 10) Please provide maintenance and testing schedules for major equipment subsystems.
- 11) Please provide documentation of the maintenance activities that have been performed in the previous 12 months.
- 12) What maintenance activities are planned to occur over the next 12 months?

- 13) What is the total current power and cooling capacity of the facility and how much is committed to current customers?
- 14) How much additional power and cooling capacity can be added in the future?
- 15) How is power and cooling distributed?
- 16) What is the height in rack units of the proposed rack space?
- 17) Is there a weight limit for each rack?
- 18) Are power distribution units (PDUs) provided? If so, are PDUs fed from separate redundant power feeds? If supplied PDUs are of the managed type, will OCERS have access to the PDU data?
- 19) What is the maximum kW per rack supported with the existing power and cooling capabilities?
- 20) What is the maximum usage as a percentage of total available power allowed per power feed?
- 21) How is power consumption measured at the facility?
- 22) Please describe in detail fire detection and suppression systems protecting the customer area.
- 23) Describe the network architecture:
 - a. What network carriers are available at the facility?
 - b. Does the site have multiple active and redundant fiber communication paths to the data center?
 - c. Does the site have multiple active and redundant Ethernet data communication paths to customer equipment?
 - d. What level of bandwidth is currently available?
 - e. How is connectivity achieved from the carrier to the client racks?
- 24) Does the facility offer the ability to connect directly to cloud providers such as Microsoft Azure or Amazon Web Services?
- 25) What manmade and natural hazards are possible at the facility and what measures have been taken to mitigate and recover from them?
- 26) What measures are in place to protect against seismic activity?

Operations and Performance

- 1) What level of certifications, if any, do your employees maintain?
- 2) Please provide information on all outages and external events by which the facility was affected in the previous 12 months and how these events were resolved.
- 3) How is a service request logged?
- 4) What is the average time to complete a service request?
- 5) Describe your process for noncompliance with the established SLA.
- 6) Please describe the physical security measures in place at the facility.
- 7) Please describe your security surveillance systems, both inside and outside the facility.
- 8) What measures are in place to prevent access to customer equipment by other customers?
- 9) What are the hours of availability to access customer equipment?

- 10) Describe the refuelling contracts in place at the facility.
- 11) Does the facility have a proven uptime of 99.99% or greater?
- 12) Is your facility staffed with technical staff capable of performing remote hands operations 24 hours a day, seven days a week, 365 days a year?
- 13) Do you offer first-responder troubleshooting services for hardware/network problems?
- 14) Do you adhere to any of the following standards: SAS70, SSAE16, SOC2, SOC3, Other (please specify)?
- 15) How does your firm protect confidentiality?
- 16) What was your facility PUE over the previous one year period?
- 17) Is your facility LEED or Energy Star rated?
- 18) What background checks are performed for onsite personnel that may have access to the customer space?
- 19) Please describe all facility monitoring systems and the level of tenant access to these systems.

Contract Management

- 1) In the case of an increase or decrease in space requirements or a change to equipment configurations, how are contract modifications handled?
- 2) Please describe contract renewal terms.
- 3) What service level agreements are offered at the facility? Please provide copies of available SLAs.
- 4) Please describe the SLA resolution process.
- 5) In the event of an outage, is a root cause analysis provided to the customer?
- 6) Do you offer a web portal that allows for the creation of tickets, notification of emergencies and ability to adjust access rules to the customer space?
- 7) What level of customer access to you provide to internal auditing documentation in support of legal, regulatory or contractual requirements?
- 8) Please provide a rate card listing all available services at the facility and their associated costs.

Section 5: RFP Points of Contact

OCERS is conducting this RFP jointly with Sidepath, Inc., a technology partner chosen to assist OCERS with this project. From the date of issuance of this RFP until the selection of a vendor is completed and announced, vendors are not permitted to communicate, for any reason, with any OCERS staff member, Sidepath employee or Board Member regarding this procurement, except through the Points of Contact named herein. For violation of this provision, OCERS shall reserve the right to disqualify the offending vendor from further participation in this procurement.

The OCERS Point of Contact for questions and all matters relating to this RFP is:

Name:	Jon Gossard
Title:	Information Technology Manager
Address:	OCERS 2223 E Wellington Ave., Suite 100 Santa Ana, CA 92701
Telephone:	(714) 569-4863
Email:	jgossard@ocers.org

The Sidepath, Inc. Point of Contact for questions and all matters relating to this RFP is:

Name:	Jim Andronaco
Title:	President
Address:	Sidepath 22892 Mill Creek Dr. Laguna Hills, CA 92653
Telephone:	(949) 748-8700
Email:	jim@sidepath.com

Section 6: Vendor Response

It is the responsibility of the vendor to ensure that the proposal arrives on or before the specified time and date. Failure to comply with this provision will result in disqualification of the RFP response.

Proposals must be jointly submitted to OCERS and Sidepath by 5 p.m. (Pacific Time Zone) on **March 3, 2017**. Make sure the point of contact name is included in the address.

Proposals may be submitted electronically in Microsoft Word or Adobe Acrobat PDF format to the email address noted in *Section 5*. Hard copies are not required but may be submitted to the address noted in *Section 5*.

Note that vendor responses will be subject to disclosure to the public upon written request under the California Public Records Act. See *Section 13: Notice Regarding the California Public Records Act and the Brown Act* later in this document for additional information.

Section 7: Proposal Requirements

Proposals must include the following information:

1. A description of your firm including location, number of years in business and scope of services offered.
2. Responses to all questions and requests listed in *Section 4* above.
3. Copies of any pertinent licenses required to deliver your company's product or service.
4. Three (3) references from three different organizations similar in project scope (see *Section 4* above).
5. A three (3) year proposal for services described in *Section 4* above.
6. A Statement of Work that defines the proposed activities, deliverables and timelines for the project.
7. Pricing information must identify non-recurring costs and monthly recurring costs separately.
8. Billing will not commence until the complete rack space, including LAN and WAN connectivity, is complete and ready for use.

Section 8: Review and Evaluation of Proposals

OCERS will convene a review panel to evaluate all proposals and make a final vendor selection. The final vendor selection will be determined by but not limited to such factors as overall pricing of the specified professional services, experience with and past performance on projects of similar size and scope and the overall fit of the vendor with OCERS.

Section 9: Right to Reject Proposal

By submitting a proposal, vendors acknowledge that they have read this RFP, understand it, and agree to be bound by its requirements unless clearly and specifically noted in the response submitted. OCERS reserves the right without prejudice to reject any and all responses. OCERS reserves the right to modify the terms and requirements of this RFP. Any such changes or corrections will be posted on OCERS' website, available at www.ocers.org.

Section 10: Incomplete Responses

If the information in the firm’s response is deemed to be insufficient for evaluation, OCERS reserves the right to request additional information or to reject the submittal outright. False, incomplete or unresponsive statements in connection with a submittal may be sufficient for its rejection. The selection of the fulfillment of the requirements will be determined by OCERS and such judgment shall be final.

Section 11: Schedule of Events

OCERS reserves the right to modify this schedule at any time.

Deliverable	Date	Time
Release of RFP	2/6/2017	8:00 am (Pacific Standard Time)
RFP Questions Deadline	2/14/2017	5:00 pm (Pacific Standard Time)
RFP Answers Posted	2/17/2017	5:00 pm (Pacific Standard Time)
RFP Submission Deadline	3/3/2017	5:00 pm (Pacific Standard Time)
OCERS Review of RFP Submissions	3/6/2017 – 3/23/2017	
Vendor Selection	3/24/2017	

Section 12: Addenda

OCERS may modify the RFP prior to the date fixed for submission by posting, mailing, emailing or faxing an addendum to the bidders known to be interested in submitting a proposal. If any bidder determines that an addendum unnecessarily restricts its ability to bid, they must notify OCERS in writing no later than three days before the deadline for submitting bids. Failure of a bidder to receive or acknowledge receipt of any addendum shall not relieve the bidder of the responsibility for complying with the terms thereof.

Section 13: Notice Regarding the California Public Records Act and the Brown Act

The proposal your firm submits in response to this RFP will become the exclusive property of OCERS. It will not be returned to you, and it will be subject to public disclosure pursuant to the California Public Records Act (California Government Code Sections 6250 et. seq., the “Act”). The Act provides generally that all records relating to a public agency’s business are open to public inspection and copying, unless specifically exempted under one of several exemptions set forth in the Act.

If you believe that any portion of your proposal is exempt from public disclosure under the Act, such portion must be marked “TRADE SECRET,” “CONFIDENTIAL,” or “PROPRIETARY.” OCERS will deny public disclosure of any portions so designated, provided that such designation is, in OCERS’ reasonable discretion, in accordance with applicable law. Proposals marked “TRADE SECRET,” “CONFIDENTIAL,” or “PROPRIETARY” in their entirety will not be honored, and OCERS will not deny public disclosure of all or any portion of

proposals so marked. By submitting a proposal with specifically selected portions marked "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" you represent you have a good faith belief that such material is exempt from disclosure under the Act, and you agree to reimburse OCERS for, and to indemnify, defend and hold harmless OCERS, its officers, fiduciaries, employees and agents from and against: (a) any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs and expenses including, without limitation, attorneys' fees, expenses and court costs of any nature whatsoever (collectively, "Claims") arising from or relating to OCERS' non-disclosure of any such designated portions of your proposal; and (b) any and all Claims arising from or relating to OCERS' public disclosure of any such designated portions of your proposal if OCERS reasonably determines disclosure is deemed required by law, or if disclosure is ordered by a court of competent jurisdiction.

In addition to the foregoing, OCERS Board and committee meetings are subject to California open-meeting requirements set forth in the Ralph M. Brown Act (Gov. Code §§ 54950-54962) (the "Brown Act"). Your proposal and/or contract (if your firm is selected) may be presented or discussed at a public meeting of the OCERS Board of Retirement (or at a Board committee meeting). Among other things, that means that, regardless of whether you mark portions of your proposal as "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY," that information may be discussed or presented at a meeting that is open to the public under the Brown Act.

OCERS and Sidepath, Inc. appreciate your time and look forward to receiving your proposal.

All RFP packages should be submitted to:

Orange County Employees Retirement System
Attention: **Jon Gossard, Information Technology Manager**
2223 E. Wellington Ave., Suite 100
Santa Ana, CA 92701

and

Sidepath, Inc.
Attention: **Jim Andronaco**
22892 Mill Creek Dr.
Laguna Hills, CA 92653

Appendix A: Proposed Topology Overview

