INVITATION TO BID NO: 10-X-2220279

STATE OF ALABAMA

DEPTARTMENT OF FINANCE
DIVISION OF PURCHASING

INVITATION TO BID

REQ. AGENCY	: 999999 PURCHASING DIVISION
AGENCY REQ. NO.	:
T-NUMBER	: T047
DATE ISSUED	: 07/19/10
VENDOR NO.	:
VENDOR PHONE NO.	:
SNAP REQ. NO.	: 1444158
BUYER NAME	: JENNIFER LORETZ
BUYER PHONE NO.	: (334) 242-7370-
PURCHASING PHONE NO	: (334) 242-7250

FOR: SUBSCRIPTION BASED IT RESEARCH AND ADVISORY SERVICES

BID MUST BE RECEIVED BEFORE:
DATE: 08/09/10 TIME: 5:00 PM

BIDS WILL BE PUBLICLY OPENED:
DATE: 08/10/10 TIME: 2:00 PM

TO BE COMPLETED BY VENDOR

INFORMATION IN THIS SECTION SHOULD BE PROVIDED, AS APPROPRIATE. BID RESPONSE MUST BE IN INK OR TYPED WITH ORIGINAL SIGNATURE AND NOTARIZATION.

1. DELIVERY: CAN BE MADE _________ DAYS OR _________ WEEKS AFTER RECEIPT OF ORDER

2. TERMS: ________________(DISCOUNTS ARE TAKEN WITHOUT REGARD TO DATE OF PAYMENT.)

3. PRICE VALID FOR ACCEPTANCE WITHIN ____________ DAYS.

4. VENDOR QUOTATION REFERENCE NUMBER, IF ANY: ______________
(THIS NUMBER WILL APPEAR ON THE PURCHASE ORDER.)

5. E-MAIL ADDRESS: ____

INTERNET WEBSITE: ____

6. GENERAL CONTRACTOR'S LICENSE NO: _____________________________________

TYPE OF G.C. LICENSE: ____

***** IMPORTANT NOTE: *****

BIDDERS MUST COMPLY WITH ALL "BID RESPONSE INSTRUCTIONS" ON PAGE 2, TO INCLUDE ITEM 7 - COPY REQUIREMENT.

RETURN INVITATION TO BID:

US MAIL	COURIER
STATE OF ALABAMA DEPARTMENT OF FINANCE DIVISION OF PURCHASING P O BOX 302620 MONTGOMERY, AL 36130-2620	STATE OF ALABAMA DIVISION OF PURCHASING RSA UNION BUILDING 100 N. UNION ST., SUITE 192 MONTGOMERY, AL 36104

SIGNATURE AND NOTARIZATION REQUIRED

I HAVE READ THE ENTIRE BID AND AGREE TO FURNISH EACH ITEM OFFERED AT THE PRICE QUOTED. I HERBY AFFIRM I HAVE NOT BEEN IN ANY AGREEMENT OR COLLUSION AMONG BIDDERS IN RESTRAINT OF FREEDOM OF COMPETITION BY AGREEMENT TO BID AT A FIXED PRICE OR TO REFRAIN FROM BIDDING.

SWORN TO AND	FEIN OR SSN	AUTHORIZED SIGNATURE (INK)
SUBSCRIBED BEFORE ME THIS	COMPANY NAME	TYPE/PRINT AUTHORIZED NAME
______ DAY OF ___________	MAIL ADDRESS	TITLE
NOTARY PUBLIC	CITY, STATE, ZIP	TOLL FREE NUMBER
TERM EXP: _______________	PHONE INCLUDING AREA CODE	FAX NUMBER

AUTHORITY:
THE DEPARTMENT OF FINANCE CODE OF ADMINISTRATIVE PROCEDURE, CHAPTER 355-4-1 EFFECTIVE DECEMBER 20, 2001 IS INCORPORATED BY REFERENCE AND MADE A PART OF T HIS DOCUMENT. TO RECEIVE A COPY CALL (334)242-7250, OR OUR WEBSITE WWW.PURCHASING.ALABAMA.GOV .

INFORMATION AND ASSISTANCE TO MINORITY AND WOMEN-OWNED BUSINESSES IN ACQUIRING M/WBE CERTIFICATION MAY BE OBTAINED FROM THE OFFICE OF MINORITY BUSINESS ENTERPRISE, 1-800-447-4191.

BID (ITB) RESPONSE INSTRUCTIONS REV: 01/14/10

1. TO SUBMIT A RESPONSIVE BID, READ THESE INSTRUCTIONS, ALL TERMS, CONDITIONS AND SPECIFICATIONS.

2. BID ENVELOPES/PACKAGES/BOXES MUST BE IDENTIFIED ON FRONT, PREFERABLY LOWER LEFT CORNER AND BE VISIBLE WITH THE BID NUMBER AND OPENING DATE. EACH INDIVIDUAL BID (IDENTIFIED BY A UNIQUE BID NUMBER) MUST BE SUBMITTED IN A SEPARATE ENVELOPE. RESPONSES TO MULTIPLE BID NUMBERS SUBMITTED IN THE SAME ENVELOPE/COURIER PACKAGE, THAT ARE NOT IN SEPARATE ENVELOPES PROPERLY IDENTIFIED, WILL BE REJECTED. THE DIVISION OF PURCHASING DOES NOT ASSUME RESPONSIBILITY FOR LATE BIDS FOR ANY REASON INCLUDING THOSE DUE TO POSTAL, OR COURIER SERVICE. BID RESPONSES MUST BE IN THE DIVISION OF PURCHASING OFFICE PRIOR TO THE "RECEIVE DATE AND TIME" INDICATED ON THE BID.

3. BID RESPONSES (PAGE 1, PRICE SHEET AND ADDENDUMS (WHEN SIGNATURE IS REQUIRED)) MUST BE IN INK OR TYPED ON THIS DOCUMENT. OR EXACT FORMAT WITH SIGNATURES BEING HANDWRITTEN ORIGINALS IN INK (PERSON SIGNING BID, NOTARY, AND NOTARY EXPIRATION), OR THE BID WILL BE REJECTED. UNLESS INDICATED IN THE BID, ALL PRICE PAGES MUST BE COMPLETED AND RETURNED. IF AN ITEM IS NOT BEING BID, IDENTIFY IT AS NB (NO-BID). PAGES SHOULD BE SECURED. THE DIVISION OF PURCHASING DOES NOT ASSUME RESPONSIBILITY FOR MISSING PAGES. FAXED BID RESPONSES WILL NOT BE ACCEPTED.

4. THE UNIT PRICE ALWAYS GOVERNS REGARDLESS OF THE EXTENDED AMOUNT. A UNIT PRICE CHANGE ON A LINE MUST BE INITIALED BY THE PERSON SIGNING THE BID, OR THAT LINE WILL BE REJECTED. THIS INCLUDES A CROSS-OUT, STRIKE-OVER, INK-OVER, WHITE-OUT, ERASURE, OR ANY OTHER METHOD CHANGING THE PRICE.

5. A "NO BID" MUST BE RETURNED TO REMAIN ON A CLASS/SUBCLASS. RETURN PAGE 1 OR NOTIFICATION PAGE MARKED "NO-BID". IDENTIFY IT ON THE ENVELOPE AS A "NO-BID". FAILING TO RESPOND TO 3 ITB'S WITHIN THE SAME CLASS/SUBCLASS WILL AUTOMATICALLY PURGE THE VENDOR FROM THAT CLASS/SUBCLASS. RESPONDING WITH 6 "NO-BIDS" WITHIN THE SAME CLASS/SUBCLASS WILL AUTOMATICALLY PURGE THE VENDOR FROM THAT CLASS/ SUBCLASS. A "NO-BID" RECEIVED LATE IS CONSIDERED A NO RESPONSE.

6. THE DIVISION OF PURCHASING IS NOT RESPONSIBLE FOR MISINTERPRETATION OF DATA FAXED FROM THIS OFFICE.

7. THE DIVISION OF PURCHASING REQUIRES AN ORIGINAL AND A MINIMUM OF ONE COMPLETE EXACT COPY (TO INCLUDE SIGNATURE AND NOTARY) OF THE INVITATION-TO-BID RESPONSE. THE ORIGINAL AND THE COPY SHOULD BE SUBMITTED TOGETHER AS A BID PACKAGE. FAILURE TO MARK RESPONSES AS "ORIGINAL" AND/OR "COPY" COULD RESULT IN THE ENTIRE BID RESPONSE BEING REJECTED.

8. AN IMPROPERLY SUBMITTED BID, LATE BID, OR BID THAT IS CANCELLED ON OR BEFORE THE OPENING DATE WILL BE HELD FOR 90 DAYS AND THEN DESTROYED. THE BID MUST BE RETRIEVED DURING REGULAR WORK HOURS, MONDAY - FRIDAY, EXCEPT STATE HOLIDAYS. AFTER THE BID IS DESTROYED, THE DIVISION OF PURCHASING ASSUMES NO RESPONSIBILITY FOR THE DOCUMENT.

DISQUALIFIED/CANCELLED BID

BIDS THAT ARE IMPROPERLY SUBMITTED OR RECEIVED LATE WILL BE A RESPONSE FOR RECORD, BUT WILL NOT BE RETURNED OR A NOTIFICATION MAILED.

THE FOLLOWING IS A PARTIAL LIST WHEREBY A BID RESPONSE WILL BE DISQUALIFIED:

BID NUMBER NOT ON FACE OF ENVELOPE/COURIER PACKAGE/BOX
RESPONSES TO MULTIPLE BID NUMBERS IN SAME ENVELOPE NOT PROPERLY IDENTIFIED
BID RECEIVED LATE
BID NOT SIGNED/NOT ORIGINAL SIGNATURE
BID NOT NOTARIZED/NOT ORIGINAL SIGNATURE OF NOTARY AND/OR NO NOTARY EXPIRATION
NOTARIZED OWN SIGNATURE
REQUIRED INFORMATION NOT SUBMITTED WITH BID
FAILURE TO SUBMIT THE ORIGINAL BID AND A COMPLETE EXACT COPY

CERTIFICATION PURSUANT TO ACT NO. 2006-557

ALABAMA LAW (SECTION 41-4-116,CODE OF ALABAMA 1975) PROVIDES THAT EVERY BID SUBMITTED AND CONTRACT EXECUTED SHALL CONTAIN A CERTIFICATION THAT THE VENDOR, CONTRACTOR, AND ALL OF ITS AFFILIATES THAT MAKE SALES FOR DELIVERY INTO ALABAMA OR LEASES FOR USE IN ALABAMA ARE REGISTERED, COLLECTING, AND REMITTING ALABAMA STATE AND LOCAL SALES, USE, AND/OR LEASE TAX ON ALL TAXABLE SALES AND LEASES INTO ALABAMA. BY SUBMITTING THIS BID, THE BIDDER IS HEARBY CERTIFYING THAT THEY ARE IN FULL COMPLIANCE WITH ACT NO. 2006-557, THEY ARE NOT BARRED FROM BIDDING OR ENTERING INTO A CONTRACT PURSUANT TO 41-4-116, AND ACKNOWLEDGES THAT THE AWARDING AUTHORITY MAY DECLARE THE CONTRACT VOID IF THE CERTIFICATION IS FALSE.

INTENT TO AWARD

EFFECTIVE MAY 1, 2008, THE STATE OF ALABAMA - DIVISION OF PURCHASING WILL ISSUE AN 'INTENT TO AWARD' BEFORE A FINAL AWARD IS MADE. THE 'INTENT TO AWARD' WILL CONTINUE FOR A PERIOD OF FIVE (5) CALENDAR DAYS, AFTER WHICH A PURCHASE ORDER WILL BE PRODUCED. UPON FINAL AWARD, ALL RIGHTS TO PROTEST ARE FORFEITED. A DETAILED EXPLANATION OF THIS PROCESS MAY BE REVIEWED IN THE ALABAMA ADMINISTRATIVE CODE - CHAPTER 355-4-1(14).

ALTERNATE BID RESPONSE

UNLESS STATED ELSEWHERE IN THIS INVITATION-TO-BID (ITB) THE STATE OF ALABAMA WILL ACCEPT AND EVALUATE ALTERNATE BID SUBMITTALS ON ANY ITB'S. ALTERNATE BID RESPONSES WILL BE EVALUATED ACCORDING TO THE REQUIREMENTS AS ALL OTHER RESPONSES TO THIS ITB.

INTERNET WEBSITE LINK'S

INTERNET AND/OR WEBSITE LINKS WILL NOT BE ACCEPTED IN BID RESPONSES AS A MEANS TO SUPPLY ANY REQUIREMENTS STATED IN THIS ITB (INVITATION-TO-BID).

PRODUCT DELIVERY, RECEIVING AND ACCEPTANCE

IN ACCORDANCE WITH THE UNIVERSAL COMMERCE CODE (CODE OF ALABAMA, TITLE 7), AFTER DELIVERY, THE STATE OF ALABAMA HAS THE RIGHT TO INSPECT ALL PRODUCTS BEFORE ACCEPTING. THE STATE WILL INSPECT PRODUCTS IN A REASONABLE TIMEFRAME. SIGNATURE ON A DELIVERY DOCUMENT DOES NOT CONSTITUTE ACCEPTANCE BY THE STATE. THE STATE WILL ACCEPT PRODUCTS ONLY AFTER SATISFACTORY INSPECTION.

SALES TAX EXEMPTION

PURSUANT TO THE CODE OF ALABAMA, 1975, TITLE 40-23-4 (A) (11), THE STATE OF ALABAMA IS EXEMPT FROM PAYING SALES TAX. AN EXEMPTION LETTER WILL BE FURNISHED UPON REQUEST.

INVOICES

INQUIRIES CONCERNING PAYMENT AFTER INVOICES HAVE BEEN SUBMITTED ARE TO BE DIRECTED TO THE RECEIVING AGENCY, NOT THE DIVISION OF PURCHASING

BID RESPONSES AND BID RESULTS

UNEVALUATED BID RESPONSES (NOT BID RESULTS) ARE AVAILABLE ON OUR WEB SITE AT WWW.PURCHASING.ALABAMA.GOV. BID RESULTS WILL BE MADE AVAILABLE FOR REVIEW IN THE DIVISION OF PURCHASING OFFICE, BUT ONLY AFTER THE BID HAS BEEN AWARDED. WE DO NOT FAX OR MAIL COPIES OF BID RESULTS. IF A VENDOR WISHES TO REVIEW BID RESULTS IN OUR OFFICE, THEY SHOULD FAX THEIR REQUEST TO REVIEW THE BID TWO DAYS IN ADVANCE TO THE "BID REVIEW CLERK" AT (334) 242-4419. BE SURE TO REFERENCE THE BID NUMBER.

FOREIGN CORPORATION - CERTIFICATE OF AUTHORITY

ALABAMA LAW PROVIDES THAT A FOREIGN CORPORATION (AN OUT-OF-STATE COMPANY/FIRM) MAY NOT TRANSACT BUSINESS IN THE STATE OF ALABAMA UNTIL IT OBTAINS A CERTIFICATE OF AUTHORITY FROM THE SECRETARY OF STATE. SECTION 10-2B-15.01, CODE OF ALABAMA 1975. TO OBTAIN FORMS FOR A CERTIFICATE OF AUTHORITY, CONTACT THE SECRETARY OF STATE, CORPORATIONS DIVISION, (334) 242-5324. THE CERTIFICATE OF AUTHORITY DOES NOT KEEP THE VENDOR FROM SUBMITTING A BID.

BID IDENTIFICATION

REFERENCE PAGE 2, ITEM 2. DUE TO THE POSTAL SERVICE PUTTING BAR CODE LABELS ON ENVELOPES, IT CONCEALS THE BID NUMBER AND DATE IF THE VENDOR HAS WRITTEN THEM OTHER THAN THE LOWER LEFT CORNER, THEREFORE THE BID WOULD BE REJECTED FOR NOT BEING PROPERLY IDENTIFIED.

AWARD:
AWARD WILL BE MADE "ALL OR NONE" TO THE LOWEST RESPONSIBLE BIDDER MEETING ALL SPECIFICATIONS.

CONTRACT PERIOD:
ESTABLISH A 24 MONTH CONTRACT WITH AN OPTION TO EXTEND FOR A SECOND 24 MONTH PERIOD PER THE TERMS AND CONDITIONS OF THE ORIGINAL BID. ANY SUCCESSIVE EXTENSION MUST HAVE WRITTEN APPROVAL OF BOTH THE STATE AND VENDOR NO LATER THAN 30 DAYS PRIOR TO EXPIRATION OF THE PREVIOUS 24 MONTH PERIOD.

PRORATION:
ANY PROVISION OF A CONTRACT RESULTING FROM THIS BID TO THE CONTRARY NOTWITHSTANDING, IN THE EVENT OF FAILURE OF THE STATE TO MAKE PAYMENT HEREUNDER AS A RESULT OF PARTIAL UNAVAILABILITY, AT THE TIME SUCH PAYMENT IS DUE, OF SUCH SUFFICIENT REVENUES OF THE STATE TO MAKE SUCH PAYMENT (PRORATION OF APPROPRIATED FUNDS FOR THE STATE HAVING BEEN DECLARED BY THE GOVERNOR PURSUANT TO SECTION 41-4-90 OF THE CODE OF ALABAMA 1975), THE CONTRACTOR SHALL HAVE THE OPTION, IN ADDITION TO THE OTHER REMEDIES OF THE CONTRACT, OF RENEGOTIATING THE CONTRACT (EXTENDING OR CHANGING PAYMENT TERMS OR AMOUNTS) OR TERMINATING THE CONTRACT.

QUANTITY:
THE STATE RESERVES THE RIGHT TO ADJUST ORDER(S) TO EQUAL FULL CARTON QUANTITIES.

PRICE SHEET

VENDOR NAME :

VENDOR NUMBER: -

ITB NO. : 10-X-2220279

INVITATION TO BID

OPEN DATE : 08/10/10 TIME: 2:00 PM

T-NUMBER : T047

RETURN DATE: 08/09/10 TIME: 5:00 PM

LINE NO.	COMMODITY/SERVICE DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	EXTENDED AMOUNT
	UNLESS SPECIFIED OTHERWISE BELOW: SHIP TO: R1 / STATEWIDE				
00001	COMMODITY CODE: 920-20-054505 CORE RESEARCH - REFERENCE: PROVIDES SECURE WEB ACCESS TO RESEARCH PUBLISHED REPORTS, VENDOR RATING, WEBINARS AND AN ONLINE NETWORK OF EXPERIENCED IT PROFESSIONALS PER ATTACHED SPECIFICATIONS	1	YR	______________	______________
00002	COMMODITY CODE: 920-20-054505 CORE RESEARCH - ADVISOR: INCLUDES CORE RESEARCH REFERENCE AND ADDS ACCESS TO PROFESSIONAL IT ANALYST TO ASSIST IN APPLYING THIS RESEARCH TO SPECIFIC ISSUES PER ATTACHED SPECIFICATIONS	1	YR	______________	______________
00003	COMMODITY CODE: 920-20-054505 IT LEADERS - REFERENCE: PROVIDES RESEARCH AND ADVICE ABOUT IT AND THE FUNCTIONAL RESPONSIBILITIES OF SPECIFIC IT LEADERSHIP ROLES PER ATTACHED SPECIFICATIONS	1	YR	______________	______________
00004	COMMODITY CODE: 920-20-054505 IT LEADERS - ADVISOR: INCLUDES IT LEADERS REFERENCE AND ADDS ADVISOR-LEVEL INQUIRY ACCESS TO PROFESSIONAL IT ANALYST TO ASSIST IN APPLYING RESEARCH TO SPECIFIC ISSUES PER ATTACHED SPECIFICATIONS	1	YR	______________	______________
00005	COMMODITY CODE: 920-20-054505 IT LEADERS - ADVISOR WORKSHOP: EXPANDED VERSION OF IT LEADERS ADVISOR DESIGNED TO ENABLE ACCESS TO IT RESOURCES IN A WORKGROUP ENVIRONMENT PER ATTACHED SPECIFICATIONS	1	YR	______________	______________
00006	COMMODITY CODE: 920-20-054505 IT EXECUTIVES SIGNATURE:	1	YR	______________	______________

PAGE TOTAL ______________

LINE NO.	COMMODITY/SERVICE DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	EXTENDED AMOUNT
	PROVIDES SENIOR-LEVEL IT EXECUTIVES WITH ON-GOING ADVISORY TO ASSIST IN CRAFTING SOLUTIONS WHERE STANDARD INDUSTRY PRACTICES HAVE NOT YET BEEN ESTABLISHED PER ATTACHED SPECIFICATIONS				
00007	COMMODITY CODE: 920-20-054505 IT EXECUTIVES CIO: PRVOIDES THE CIO PERSONALIZED ACCESS TO RESEARCH AND ANALYST EXPERTISE AND ROLE-SPECIFIC TOOLS TO DELIVER BUSINESS RESULTS FOR THE ORGANIZATION PER ATTACHED SPECIFICATIONS	1	YR	______________	______________
00008	COMMODITY CODE: 920-20-054505 IT EXECUTIVES CIO ESSENTIALS: PROVIDES ASSISTANCE TO SENIOR-LEVEL IT EXECUTIVES IN OPERATING A MORE COST EFFECTIVE ORGANIZATION PER ATTACHED SPECIFICATIONS	1	YR	______________	______________
00009	COMMODITY CODE: 920-20-054505 BIDDER IT REFERENCE: PROVIDES ACCESS TO IT RESEARCH FOCUSING ON APPLICATION PLATFORMS, COLLABORATION AND CONTENT MANAGE-MENT, DATA CENTER, NETWORK, TELECOMM, ETC. VIA BIDDER'S GROUP PER ATTACHED SPECIFICATIONS	1	YR	______________	______________
00010	COMMODITY CODE: 920-20-054505 BIDDER IT ADVISOR: PROVIDES ACCESS TO WEB RESEARCH AND DIALOGUES WITH IT ANALYSTS TO APPLY THAT RESEARCH TO ISSUES PER ATTACHED SPECIFICATIONS	1	YR	______________	______________

PAGE TOTAL ______________

BID TOTAL ______________

STATE OF ALABAMA
DEPARTMENT OF FINANCE
INFORMATION SERVICES DIVISION

INVITATION TO BID

FOR

IT RESEARCH AND ADVISORY SERVICES

SECTION I
INTRODUCTION

I.1. Statement of Purpose: The State of Alabama, hereafter referred to as STATE, has established a need for a statewide enterprise contract for subscription-based Information Technology (IT) Research and Advisory Services. The purpose of this Invitation to Bid (ITB) is to obtain competitive bids from interested vendors, for the purpose of establishing a statewide purchasing contract for the level of subscription-based IT Research and Advisory Services specified in this ITB, with award to a single IT Research and Advisory Services provider, hereinafter referred to as the BIDDER, for a period of two years from date of award to be used as necessary to fulfill the needs of state agencies, departments, boards, and commissions, hereinafter referred to as AGENCY. The BIDDER will bid a one (1) year annual subscription rate for subscription-based IT Research and Advisory Services which will be in effect during the entire term of the two year contract. Additional contract renewals, if said option is exercised by the STATE, would begin the day after the last contract term expires. The STATE will have an option to issue an additional two year renewal, with the same terms and conditions as the original contract, with the express provision that the annual subscription rate applicable during the entire term of the two year contract renewal may increase by no more than 3 % above the previous contract rate. Appropriate State of Alabama Purchasing laws, terms, and conditions will apply, including a limitation on the term of the contract to five years, including renewal periods.

I.2. Scope: This ITB solicits the delivery of subscription-based IT Research and Advisory Services. These services must cover every aspect of information technology to provide the STATE's decision-makers with the base of knowledge needed to capitalize on IT technologies to ensure that appropriate and emerging technology supports the STATE's business strategies. The research and advice must be targeted at both IT and business management professionals. It must, at a minimum, include a full range of IT Research and Advisory Services, including research notes, templates, diagnostic tools, presentations, benchmarking data, analysis reports, audio briefings, conference tickets, product and vendor evaluations, and full Internet access to services and reports. The STATE requires the IT Research and Advisory Services to be relevant, meaningful, timely, clearly organized, and consistent. The subscribers will rely on these services to better understand the application of technology, IT management strategy, changing technology trends, business drivers and specific vendor products and services. This information is needed to facilitate informed decisions, ensure selection of the best products at the best prices, and to assure the success of information technology initiatives.

I.3. Objective: The objective is to provide AGENCIES access to the subscription-based IT Research and Advisory Services as described in Section VI of this ITB.

SECTION II
General Information

II.1. ITB Contact Information: All questions concerning purchasing procedures related this ITB must be submitted in writing to the below.

Jennifer Loretz, Buyer
State of Alabama, Department of Finance
Division of Purchasing
E-mail: Jennifer.Loretz@purchasing.alabama.gov

All questions concerning line item requirements or special terms and conditions defined herein must be submitted in writing to:

Rick Boyce
Information Services Division
Email: Rick.Boyce@isd.alabama.gov

NOTE: If sending correspondence by USPS overnight, FedEx, UPS or other overnight services use ZIP CODE 36104!

From the date of issuance of this ITB, until the award is made and announced, all questions concerning this ITB shall be directed to the points of contact listed above. It is not permissible for any BIDDER, or any entity working on behalf of a BIDDER, to solicit information regarding this ITB from any government source (federal or State) other than from the official points of contact listed above. Specification questions must be submitted in writing to the agency no later than 27 July, 2010 by 5:00 PM central time. Any unauthorized solicitations for information that are reported are grounds for disqualification of the Vendor's bid.

II.2. Vendor Qualifications: All vendors must meet the following minimum qualifications:

1. BIDDER must include documentation showing that the BIDDER has recent experience and demonstrated proficiency in providing subscription-based IT Research and Advisory Services within the past three years.
2. BIDDER must submit a signed statement in their bid providing assurances against any potential conflict of interest by certifying that the BIDDER has no vested interest in any commercial venture marketing computer hardware, software, business solutions, systems integration or project implementations.

II.3. Incorrect Bid Information: If the STATE determines that a BIDDER has provided, for consideration in the evaluation or award process any false or incorrect information which the BIDDER knew or should have known was materially incorrect, that bid shall be declared non-responsive, and the bid will be disqualified.

II.4. Proposal of Alternate Services: Bids of alternate services (i.e., bids that offer something different from that requested by the STATE) shall be declared non-responsive and be disqualified.

II.5. Limited Liability: The STATE will not be liable for any direct, indirect, special, or consequential damages (including loss of profits) arising out of the performance of services by CONTRACTOR under this contract.

II.6. Conflict of Interest and Bid Restrictions:

II.6.1. Required Alabama Disclosure Statement: By submitting a bid, the BIDDER certifies that no amount shall be paid directly or indirectly to an employee or official of the State of Alabama as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, SUB-CONTRACTOR, or consultant to the BIDDER in connection with the procurement under this ITB. Act 2001-955 requires the winning BIDDER to submit an Alabama Disclosure Statement within ten days of purchase order award. Bidders may go to the site below to download a copy of the Alabama Disclosure Statement:

http://www.ago.state.al.us/ag_items.cfm?Item=70

II.6.2. ITB Amendment and Cancellation: The STATE reserves the unilateral right to amend this ITB in writing at any time. The STATE also reserves the right to cancel or reissue the ITB at its sole discretion. Any changes or modifications to this ITB will be made by a written addendum issued by the Department of Finance's Division of Purchasing. BIDDERs' shall respond to the final written ITB and any exhibits, attachments, and amendments.

II.6.3. Contract Restrictions: The contract established as a result of award may only be used for acquisition of subscription-based IT Research and Advisory Services as stated in this ITB. Use of this contract to provide services, other than those specified may result in contract termination.

II.6.4. Disclosure of Bid Contents: Upon submission, all bids become the property of the State of Alabama. Upon contract award, all information contained in the bids will become public information.

II.6.5. News Releases and Public Announcements: News releases or other public announcements pertaining to this acquisition may only be made with prior written consent and approval of text by the Finance Director of the State of Alabama.

II.7. Sufficient Appropriation: The STATE relies on grants and federal funding for a significant portion of the STATE's resources. Any order placed as a result of the ITB process may be terminated if sufficient appropriations or authorizations do not exist. Such termination will be effected by sending written notice to the CONTRACTOR. The STATE's decision as to whether sufficient appropriations and authorizations are available will be accepted by the CONTRACTOR as final.

II.8. Bid Awards and Governing Law: This procurement is governed by Section 41-16-20, et seq., Code of Alabama (1975), and the administrative regulations of the Department of Finance, Division of Purchasing. The State may award a contract by accepting the **lowest responsible bid** that meets all the specifications for all services required by this ITB. The STATE reserves the right to incorporate standard State of Alabama contractual provisions into any contract executed as a result of any bid submitted in response to this ITB. Appropriate State of Alabama Purchasing laws, terms, and conditions will apply, including a limitation on the term of the contract to five years, including renewal periods. The award of the contract will be reviewed by legal counsel of the Department of Finance as to compliance with State of Alabama laws and the terms and conditions of this ITB.

II.9. Nondiscrimination: No person shall be excluded from participation in, be denied benefits of, be discriminated against in the admission or access to, or be discriminated against in treatment or employment in the STATE contracted programs or activities on the grounds of handicap and/or disability, age, race, color, religion, sex, national origin, or any other classification protected by federal or Alabama State Constitutional or statutory law; nor shall they be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of contracts with the STATE or in the employment practices of the State's BIDDERs. Accordingly, all BIDDERs entering into contracts with the STATE shall, upon request, be required to show proof of such nondiscrimination and to post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.

II.10. The State of Alabama retains the right to reject any and all bids.

SECTION III
Bid Format and Content

III.1. Response Preparation and General Bid Format Requirements:

III.1.1. Bid Responses: All bid responses must be in the same numerical paragraph labeling, format and sequence as shown in this document.

III.1.2. Bid Preparation Costs: The STATE will not pay any costs associated with the preparation, submittal, or presentation of any bid.

III.1.3. Response Submissions and Bid Format: The BIDDER must submit one original and two copies of their bid response. Each document must be signed and duly notarized. In addition to all other requested information, BIDDERs must submit three (3) soft copies of their bid proposal on CD or DVD media for use during bid evaluation. Bid must be in the same format and sequence as presented in this ITB. Bid responses must be clearly labeled to indicate the corresponding paragraph that the response is referring to. In specific sections of the bid where detailed responses are not requested, a response of "Read, understands and will comply" is an acceptable response. However, where applicable, the bid must contain a brief statement from the BIDDER in response to specific requirements (by paragraph I.1., I.2., etc.) describing how the BIDDER intends to meet the requirements of the Invitation to Bid. Failure to follow the specified format of the bid sheet, to label the responses correctly, or to address all of the requirements may, at the STATE's discretion, result in the **disqualification of the Bid**.

III.1.4. Extraneous Information: Bids must not contain extraneous information. All information presented in a Bid must be relevant in response to a requirement of this ITB and must be clearly labeled. Any information not meeting these criteria shall be deemed extraneous and shall in no way contribute to the evaluation process. A BIDDER may not submit their own contract terms and conditions in a response to this ITB.

III.1.5. Contact Information: Awarded bidder will be required to specify the name, title, office address, email, brief resume and business telephone number of BIDDERs' primary business contact(s) for the services specified in this ITB. i.e. those individuals responsible for the performance under the anticipated contract resulting from this ITB, including those individuals with primary day–to–day responsibility for the services contemplated herein.

III. 1.6. References: Provide a list of at least five (5) references where the BIDDER has provided subscription-based IT research and advisory services which are the same or substantially similar to those specified herein for a comparably sized state, within the past two years. Include reference account or company name, address, contact person and the contact person's telephone number and e-mail address All references will be evaluated prior to recommendation of award. Negative references will become grounds for denial of award.

SECTION IV
Evaluation process

IV.1. ITB Evaluation Criteria: The first evaluation criteria will be the initial one (1) year subscription rate inclusive of all line items listed in this ITB. The low bid will then undergo a Qualification Review based on the BIDDERs' fulfillment of the requirements of this ITB. In the event the low bid does not meet all elements of the evaluation requirements, the bid will be "Disqualified" and the next lowest bid will be considered. This process will be continued in successive order until the lowest bid is determined to meet all bid requirements. If the STATE determines that none of the bids meet the requirements of this ITB, the STATE retains the right to cancel this ITB and at the STATE's sole discretion, may or may not re-bid this proposal.

SECTION V
General Terms and Conditions

V.1. Confidentiality of State of Alabama Materials or Information: All materials or information (e.g., verbal, written or electronic) furnished by relating to State of Alabama business functions or processes shall be considered "proprietary and confidential" by the CONTRACTOR personnel and its designees. Materials include, but are not limited to, memoranda, organization charts, official correspondence, e-mail, telephone correspondence, internet/intranet activity, studies, plans, reports, surveys, analyses, and/or projections (except such information and materials as may already be public knowledge or established to be in the public domain). CONTRACTOR personnel and its designees shall not disclose any of such materials or information without written approval. Breach of confidentiality may result in criminal prosecution as governed by the laws of the State of Alabama

V.2. Disposition of materials upon termination or expiration of contract: Upon termination or expiration of the contract, all software, documentation, secure access control cards, building keys, or materials belonging to the CONTRACTOR or the STATE shall be returned to the respective owner thereof and no copies shall be retained by the non-owning party.

V.2.1. Contractor Software or Documentation: Software or documentation developed by the CONTRACTOR prior to this contract or developed by the CONTRACTOR outside of this contract and used by the CONTRACTOR to fulfill its obligation under this contract will remain the exclusive property of the CONTRACTOR. The STATE and its employees will treat as "Confidential" all software or documentation referred to in this paragraph (except such information as may be established to be in the public domain) and shall not disclose to third parties any of such CONTRACTOR products without the CONTRACTOR's prior written approval.

V.2.2. Documentation Deliverables: Documentation developed for the STATE by CONTRACTOR personnel while performing services for the STATE pursuant to this contract shall be the exclusive property of the STATE.

V.3. Restriction of Non-compete Agreements: The CONTRACTOR agrees to enter into an appropriate agreement with the individuals set forth in a contract to allow those individuals to enter into discussions with STATE representatives, and to accept employment with any agency of the STATE, without the risk of suit by the CONTRACTOR under the terms of any covenant not to compete that the CONTRACTOR may hold.

V.4. Restriction of Recruiting State of Alabama Personnel: During the term of this contract, the CONTRACTOR shall not solicit to hire, either directly or indirectly, any State of Alabama personnel the CONTRACTOR may have come in contact with as a result of this contract for a period of twelve (12) months after the termination of this contract.

V.5. Other Contracts: During the course of their purchase, AGENCIES will specify the AGENCY recipient and the type of subscription being purchased. This is subject to applicable State of Alabama law.

SECTION VI
General Statements of Work and Other Requirements

VI. General Requirements: The goal is to provide a wide range of subscription-based IT Research and Advisory Services ranging from basic development up to and including a multi-facetted IT Research and Advisory capability to AGENCIES within the State of Alabama

VI.1. Overview: AGENCY IT staff maintains an extensive computing environment to meet its customers' needs. The IT staff constantly investigates improved methods to provide these services through the use of new technology and requires access to the most current information, research, trends, recommendations, and advice on technology. This includes advice from industry experts as well as experience from peers.

VI.2. Scope of Services: The purpose of this solicitation is to acquire subscription-based IT Research and Advisory Services meeting the requirements and provisions stated herein. Rapid access to high quality information and analytical/advisory services is expected to assist the AGENCY in policy making; resource planning and management; project development; management and evaluation; vendor/supplier assessment; purchase decisions; contract negotiations; and industry trend analysis. The AGENCY expects the information content and the advisory services to be accurate, clear, relevant, timely, comprehensive, unbiased, and of high quality.

VI.3. Bid Line Items: The BIDDER must respond to all line items with their maximum subscription rate whenever they meet EVERY requirement listed in the respective general description for that line item. The rates bid <u>must be all inclusive including all expenses</u> of providing that line item classification to the STATE for a period of one (1) year under the terms of an annual subscription. Subscription-based IT Research and Advisory Services for a State of Alabama AGENCY as set forth in this ITB inclusive of all IT Research and Advisory Services specified below:

VI.3.1. Line Item # 1 - <u>CORE RESEARCH – REFERENCE</u>

Core research - reference is a service that provides research and advice about information technology for decision makers.

DELIVERABLES - Core Research – Reference Deliverables:

a. • **Core Connect Web Pages ─** Provides access to a knowledge base and broad range of technology topics for technology leaders.

b. • **A Range of Written Research Reports**, such as:
   1. **Published Research ─** Covers companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
   2. **Vendor and Product Ratings ─** Provides a holistic view of IT vendors.
   3. **Special Reports ─** Cover underlying themes that cut across technology research.

c. • **Peer Connect ─** A secure online network of IT professionals who can access and leverage the collective experience of their peers.

• **Webinars ─** Periodic Web conferences where analysts speak on timely topics in information technology and then solicit questions from listeners.

VI.3.2. Line Item # 2 - CORE RESEARCH – ADVISOR

Core research – advisor is a service that provides research and advice about information technology for decision makers. Core research advisor provides AGENCIES with the base of knowledge and advice needed to capitalize on IT technologies and markets.

DELIVERABLES - Core Research – Advisor Deliverables:

a. • **Core Connect Web Pages** ─ Provides access to a knowledge base and broad range of technology topics for technology leaders.

b. • **A Range of Written Research Reports**, such as:
   1. **Published Research** ─ Covers companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
   2. **Vendor and Product Ratings** ─ Provides a holistic view of IT vendors.
   3. **Special Reports** ─ Cover underlying themes that cut across technology research.

c. • **Peer Connect** ─ A secure online network of IT professionals who can access and leverage the collective experience of their peers.

d. • **Webinars** ─ Periodic Web conferences where analysts speak on timely topics in information technology and then solicit questions from listeners.

e. **Standard Analyst Inquiry** ─ Licensed Users may engage with an Analyst to:
   (i) Discuss a research document published within the scope of their specific service, and/or
   (ii) Apply a research document to a related issue that their AGENCY is facing. Typical inquiry sessions can take up to 30 (thirty) minutes of an Analyst's time. Standard Analyst Inquiry provides basic technology reviews of business-related documents that are 20 (twenty) pages or less, and take up to 60 (sixty) minutes of an Analyst's time. Inquiries requiring additional analysis or research by the Analyst are not included.

f. • **Talking Technology** ─ Concise and expert commentaries on the latest IT topics in a monthly audio program that can either be listened to online, or downloaded to listen to in MP3 format.

g. • **Event Ticket** ─ Admission to one (1) day at the BIDDER'S annual conference focusing on topics such as Best Practices, Methodology and Implementation strategies. Other special programs, seminars, tutorials, and workshops are not included in the event ticket deliverable and may require an additional fee. Tickets are transferable within the AGENCY organization but may not be transferred to another AGENCY.

VI.3.3. Line Item # 3 - <u>IT LEADERS – REFERENCE</u>

IT Leaders Reference is a service that provides AGENCIES with research and advice about information technology and the functional responsibilities of specific IT roles. By connecting IT Leaders Reference resources to AGENCIES' daily business needs, IT Leaders Reference makes it easier for AGENCIES to find the information they need to make informed decisions.

DELIVERABLES - IT Leaders Reference Deliverables:

a. • **Access to all IT Leaders Role-Based Web Pages ─** Exclusive online home pages that serve as gateways to role-specific content such as activity cycles, blogs, polling, top research picks, and most-viewed research.

b. • **Community ─** Access to an exclusive online community that provides insight and experience from both analysts and IT peers who share common interests related to specific roles.

c. • **News and Analysis ─** Timely analysis of breaking news of interest to specific technology roles, which keeps IT leaders current.

d. • **Access to Core Research ─** Research accessible online, which covers a broad range of technology topics and provides a base of knowledge for all technology leaders.

e. • **Access to Benchmarking Analytics IT Key Metrics Data ─** Accessible online, IT Key Metrics Data provides a comprehensive database of the industry's most definitive IT spending and staffing levels in addition to key technology cost and performance metrics.

f. • **A Range of Written Research Reports,** such as:

1. **Vendor and Product Ratings ─** A report that provides AGENCY organizations with a holistic view of the vendors from which they are purchasing products and services.
2. **Special Reports ─** Reports that
   (i) cover underlying research themes that cut across technology or industry-specific research, or
   (ii) provide in-depth strategic analysis of trends, industry developments, vendors, products and services.
3. **Published Research ─** Reports that focus on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions
4. **Toolkit Resources ─** Prescriptive, downloadable and diagnostic resources that provide actionable advice and guidance on how to execute specific actions organized by specific roles and activities. Downloadable tools and templates may be altered by AGENCIES for their own internal non-commercial use.

VI.3.4. Line Item # 4 - <u>IT Leaders – Advisor</u>

IT Leaders Advisor is a service that provides users with research and advice about information technology and the functional responsibilities of specific IT roles. By connecting IT Leaders Advisor resources to AGENCIES' daily business needs, IT Leaders Advisor makes it easier for AGENCIES to find the information necessary to make informed decisions.

DELIVERABLES - IT Leaders Advisor Deliverables:

a. • **Access to all IT Leaders Role-Based Web Pages ─** Exclusive online home pages that serve as gateways to role-specific content such as activity cycles, blogs, polling, top research picks, and most-viewed research.

b. • **Community ─** Access to an exclusive online community that provides insight and experience from both analysts and IT peers who share common interests related to specific roles.

c. • **News and Analysis ─** Timely analysis of breaking news of interest to specific technology roles, which keeps IT leaders current.

d. • **Access to Core Research ─** Research accessible online, which covers a broad range of technology topics and provides a base of knowledge for all technology leaders.

e. • **Access to Benchmarking Analytics IT Key Metrics Data ─** Accessible online, IT Key Metrics Data provides a comprehensive database of the industry's most definitive IT spending and staffing levels in addition to key technology cost and performance metrics.

f. • **A Range of Written Research Reports,** such as:

1. **Vendor and Product Ratings ─** A report that provides AGENCY organizations with a holistic view of the vendors from which they are purchasing products and services.
2. **Special Reports ─** Reports that
   (i) may cover underlying research themes that cut across technology or industry-specific research, or
   (ii) may provide in-depth strategic analysis of trends, industry developments, vendors, products and services.
3. **Published Research ─** Reports that focus on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions
4. **Toolkit Resources ─** Prescriptive, downloadable and diagnostic resources that provide actionable advice and guidance on how to execute specific actions organized by specific roles and activities. Downloadable tools and templates may be altered by AGENCIES for their own internal non-commercial use only.

(**VI.3.4. Continued)** Named Licensed Users of IT Leaders Advisor receive all of the IT Leaders Advisor deliverables listed above, as well as:

g. • **IT Leaders Advisor Analyst Inquiry ─** Provides Licensed Users with access to Analysts who are associated with the Service purchased by AGENCY. Participation in Standard Analyst Inquiry is subject to the following terms:

1. Licensed Users, who have Advisor-level Inquiry access, may engage with an analyst:
   (i) to discuss a research document published within the scope of their specific service, and/or
   (ii) to apply a research document to a related issue that their AGENCY is facing.
2. Participation in Analyst Inquiry is limited to the Licensed User(s) and the analyst only (i.e., non-users, either inside or outside of the AGENCY, may not attend or otherwise participate on the call).
3. Analyst Inquiry sessions may take up to 30 (thirty) minutes of an analyst's time.
4. Analyst Inquiry sessions may also be used to request basic technology reviews of business-related documents that are 20 (twenty) pages or less and take up to 60 (sixty) minutes of an analyst's time. Examples of these documents include requests for proposals, marketing or business plans and procurement agreements.

h. • **Webinars ─** Periodic Web conferences where analysts speak on timely topics in information technology and then solicit questions from listeners.

i. • **Talking Technology Series ─** Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to online or downloaded to listen to in MP3 format.

j. • **Event Ticket ─** Admission to one (1) day at the BIDDER'S annual conference focusing on topics such as Best Practices, Methodology and Implementation strategies. Other special programs, seminars, tutorials, and workshops are not included in the event ticket deliverable and may require an additional fee. Tickets are transferable within the AGENCY organization but may not be transferred to another AGENCY.

VI.3.5. Line Item # 5 - <u>IT LEADERS – ADVISOR WORKGROUP</u>

IT Leaders Advisor Workgroup (the "Service") is an expanded version of the standard IT Leaders Advisor offering that is expressly designed to enable AGENCIES to access BIDDER'S resources in a workgroup environment.

The Service is intended for use by IT Leaders Workgroup Advisors and their direct reports or cross-functional teams (the "Workgroup Members"), as set forth on the Workgroup Member Form. Collectively, the IT Leaders Workgroup Advisor and his/her Workgroup Members are "Licensed Users."

The Service enables the IT Leaders Workgroup Advisor to collaborate with his/her Workgroup Members by providing them with access to Research related to information technology and the functional responsibilities of specific IT roles, and also by permitting them to participate in Analyst Inquiry scheduled by the IT Leaders Workgroup Advisor.

DELIVERABLES - IT Leader Workgroup Advisor Deliverables:

a. • **IT Leaders Role-based Web Pages ─** Includes exclusive BIDDER home pages that serve as gateways to role-specific content such as activity cycles, blogs, polling, top research picks, and most-viewed research.
b. • **Core Research ─** Research accessible online, which covers a broad range of technology topics and provides a base of knowledge for all technology leaders.
c. • **IT Key Metrics Data ─** Provides a comprehensive database on industry, IT spending and staffing levels in addition to key technology cost and performance metrics.
d. • **News and Analysis ─** Timely analysis of news of interest to specific technology roles.
e. • **A Range of Written Research Reports ─** Includes vendor and product ratings, special reports, and downloadable tools and templates, which may be altered by AGENCIES for their own internal non-commercial use.
f. • **Tools for Workgroup Collaboration ─** Enables sharing of Workgroup Member-generated document tags with Workgroup Members and vice versa.
g. • **Workgroup Usage Reports ─** Provides summary usage reports for each Workgroup Member, including Member name, number of documents opened, remaining to be opened, and reversed, i.e., when a document is opened but does not meet the information need.
h. • **Peer Connect ─** A secure online network of IT professionals who can access and leverage the collective experience of their peers.

(VI.3.5. Continued)

i. **IT Leader Workgroup Advisor Analyst Inquiry ─** Provides access to BIDDER'S analysts who are associated with the service purchased by AGENCY. Workgroup Members may participate in Analyst Inquiry so long as their IT Leader Workgroup Advisor schedules and facilitates the Inquiry. Participation in Standard Analyst Inquiry is subject to the following terms:
   1. Licensed Users may engage with a BIDDER'S analyst:
      (i) to discuss a research document published within the scope of their specific service, and/or
      (ii) to apply a research document to a related issue that their AGENCY is facing.
   2. Participation in Analyst Inquiry is limited to the Licensed User(s) and the BIDDER'S analyst only (i.e., non-Users, either inside or outside of the AGENCY, may not attend or otherwise participate on the call).
   3. Analyst Inquiry sessions may take up to 30 (thirty) minutes of an Analyst's time.
   4. Analyst Inquiry sessions may also be used to request basic technology reviews of business-related documents that are 20 (twenty) pages or less and take up to 60 (sixty) minutes of an Analyst's time.

j. • **Webinars ─** Periodic Web conferences where BIDDER'S analysts speak on timely topics in information technology and then solicit questions from listeners.

k. • **Talking Technology Series ─** Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to online or downloaded to listen to in MP3 format.

l. • **Event Ticket ─** Admission to one (1) day at the BIDDER'S annual conference focusing on topics such as Best Practices, Methodology and Implementation strategies. Other special programs, seminars, tutorials, and workshops are not included in the event ticket deliverable and may require an additional fee. Tickets are transferable within the AGENCY organization but may not be transferred to another AGENCY.

DELIVERABLES - IT Leader Workgroup Member Deliverables:

All of the **IT Leader Workgroup Advisor Deliverables** set forth above, except for "Workgroup Usage Reports" and "Summit Event Ticket".

a. • **Document Allocation ─** During the contract term, each Workgroup Member may open online
   i. BIDDER Weekly Picks and News Analysis research documents; and
   ii. up to 20 (twenty) additional BIDDER research documents of his/her choosing.

b. • **Reversals ─** Allows Workgroup Members to reverse the debit(s) of specific document(s) up to five (5) times per calendar quarter.

c. • **Counter ─** Helps Workgroup Members keep track of number of documents opened and number that remain to be opened.

d. • **Inquiry Participation ─** Workgroup Members may participate in Analyst Inquiry provided that their IT Leader Workgroup Advisor schedules and facilitates the Inquiry session.

NOTE – BIDDER'S pricing for this IT Leader Workgroup must be presented on an escalating scale showing the price for the IT Leader Workgroup Advisor and up to ten members. i.e. the bid must contain the price for the IT Leader Workgroup Advisor and three members, then the price for the IT Leader Workgroup Advisor and four members etc.

VI.3.6. Line Item # 6 - IT EXECUTIVES SIGNATURE

The IT Executives CIO Signature membership is for the most senior-level IT executives of complex organizations whose business models rely heavily on IT. This service provides agencies with an ongoing advisory relationship with BIDDER and assistance in crafting answers to questions where standard industry practices have not yet been defined.

DELIVERABLES - IT Executives Signature Deliverables:
AGENCY may designate two (2) "Members," who have access to all of the Deliverables described below (except for the Professional Development for the Delegate); and the "Delegate," who has access only to the Content, Assigned Service Delivery Team, Professional Development for the Delegate, Advisory Services, and Online Networking (Peer Connect) Deliverables described below.

a. • **Content**

1. **Executive Programs Research Reports** — Up to 12 (twelve) Reports per year; covering topics selected such as IT Governance, Business Value of IT, Architecture, and other areas where business and IT intersect.
2. **Leadership Development** — Developed for the aspiring CIO and the professional development of the Delegate and accessed via the BIDDER'S Leadership Development Web site.
3. **BIDDER'S Program for IT Executives** — Targeted role-specific content, such as pod casts, video casts, polling, and top research picks accessed via any of the IT Executives role Web sites.
4. **Teleconferences** — Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.
5. **Access to BIDDER'S Core Research.**
6. **Access to BIDDER for IT Leaders content and role pages.**
7. **Talking Technologies Series** — Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to online or downloaded to listen to in MP3 format.

b • **Assigned Service Delivery Team**

A service delivery team ("Delivery Team"), consisting of an Executive Partner and an Executive Client Manager, will be assigned to the Member and their respective Delegate, and will serve as the Member's primary points of contact for all of the resources available under this Service. The Delivery Team will work with the Member to develop a plan (the "Member Value Plan"), which will highlight value sought; identify key issues on which delivery of the Member's Service may focus; and outline how the Service can effectively deliver that value. Progress against the Member Value Plan will be reviewed during the contract year as follows:

1. **Strategy Meetings** — Up to four (4) times per year, the Executive Partner will meet face to face with either the Member, the Member and the Delegate, or the Delegate on the Member's behalf ("Strategy Meeting"). These Strategy Meetings may be used to:
   a. Review and apply Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content;
   b. Draw on the Executive Partner's professional experience to advise the Member in the context of the Member's issues; and
   c. Develop, discuss the progress of, or evaluate the Member's Member Value Plan.

2. **Optional Substitutions for Strategy Meetings ─** Each of the following architected sessions are available to the Member for their use during the contract period. The Delivery Team will work with the Member to determine which, if any, of these sessions would be of value for inclusion in the Member Value Plan. Each session used by the Member will count as one (1) of the four (4) Strategy Meetings to which they are entitled annually. Participation in these sessions is limited to the Member and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member must be present and the purpose of the session must be to advance the Member's agenda. Each of the following sessions may be used once per contract year:

    a. **Onsite Analyst Briefing ─** Member meets on AGENCY premises with a BIDDER'S Analyst for a half-day for knowledge-based, individual or project advisory assistance, typically involving delivery of BIDDER'S Content.

    b. **Executive Programs Workshop ─** Member meets on AGENCY premises with BIDDER'S Executive Programs Expert for a half-day facilitated workshop focusing on the application of BIDDER'S Executive Programs Research and action planning. Topic for the workshop will be selected by the Member and the Delivery Team from a list of available Executive Programs workshops and participation will be limited to 25 (twenty-five) Members and/or team members.

3. **Contextualized Targeted Research ─** On an as-needed basis, the Delivery Team will e-mail to the Member or Delegate selected Research which has been synthesized and put into the Member's context, based on the Member Value Plan.

c. **Professional Development for the Delegate**

The Member has the option of providing professional development to the Delegate. At Member's option, the following will be offered to the Delegate:

1. **Individual Development Plan ─** The assigned Executive Partner will work with the Delegate to develop an individual development plan (the "Individual Development Plan"), which will highlight objectives sought, identify key areas of focus, and outline how the Service can effectively meet those goals. Progress against the Individual Development Plan will be reviewed during the contract year as follows:
2. **Coaching Teleconferences ─** Up to four (4) times per year, the Executive Partner will conduct teleconferences ("Coaching Teleconferences") with the Delegate. These Coaching Teleconferences may be used to:
    a. Review and apply Leadership Development Research, Executive Programs research, or other relevant content;
    b. Draw on the Executive Partner's professional experience to advise the Delegate in the context of the Delegate's professional and career goals; and
    c. Develop, discuss the progress of, or evaluate the Delegate's Individual Development Plan.

d. • **Advisory Services**

b. **IT Executives Analyst Inquiry ─** Provides the Member and the Delegate with access to BIDDER'S Analysts who are associated with the Service purchased by the AGENCY.

   a. Participation in Analyst Inquiry is limited to the BIDDER'S Analyst, the Member and/or the Delegate, and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member and/or the Delegate must be present on the Inquiry call and the purpose of the Inquiry call must be to advance the Member's agenda.

   b. Participation in Analyst Inquiry as part of this Service is subject to the terms set forth in the Usage Guidelines for BIDDER'S services posted online.

1. **Executive Programs CIO Research Inquiries ─** Inquiry access to BIDDER'S Executive Programs CIO Researchers through IT Executives Analyst Inquiry; limited to topics covered in Executive Programs Research Reports, as published by BIDDER'S Executive Programs.

e • **Events**

1. **Symposium ─** Two (2) complimentary invitations for attendance to BIDDER'S Symposium, including all standard Symposium attendee rights plus Executive Programs VIP access. These invitations are non-transferable except within the client organization between the Member and their named Delegate.
2. **Exclusive Executive Programs Events ─** Complimentary non-transferable invitation for attendance, by the Member only, at local content-based events in Member's region or country.

f. • **Networking**

1. **Facilitated Networking ─** Member may request meetings or conference calls with peers around a specific topic/issue in order to exchange information about best practices or areas of expertise. Available to the Member only.
2. **Online Networking ─** Access to Peer Connect.

VI.3.7. Line Item # 7 - IT EXECUTIVES CIO

IT Executives is a service for the most senior-level executive ("CIO") in the IT organization and equips them with the role-specific tools and knowledge they need to deliver exceptional business results for their organizations. Members benefit from targeted insight and a community of their peers, along with personalized access to BIDDER'S research and analyst expertise.

DELIVERABLES - IT Executives CIO Deliverables:

Client may designate one "Member," who has access to the Deliverables described below.

a. • **Content**

1. **Executive Programs Research Reports ─** Up to 12 (twelve) Reports per year; covering topics selected such as IT Governance, Business Value of IT, Architecture, and other areas where business and IT intersect.
2. **BIDDER'S Program for IT Executives ─** Targeted role-specific content, such as pod casts, video casts, polling, and top research picks accessed via any of the BIDDER'S IT Executives role Web sites.
3. **Teleconferences ─** Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.
4. **Access** to BIDDER'S Core Research.
5. **Access** to BIDDER for IT Leaders content and role pages.
6. **Talking Technologies Series ─** Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to online or downloaded to listen to in MP3 format.

b • **Assigned Service Delivery Team**

A service delivery team ("Delivery Team"), consisting of an Executive Partner and an Executive Client Manager, will be assigned to the Member and their respective Delegate, and will serve as the Member's primary points of contact for all of the resources available under this Service. The Delivery Team will work with the Member to develop a plan (the "Member Value Plan"), which will highlight value sought; identify key issues on which delivery of the Member's Service may focus; and outline how the Service can effectively deliver that value. Progress against the Member Value Plan will be reviewed during the contract year as follows:

1. **Strategy Meetings ─** Up to four (4) times per year, the Executive Partner will meet face to face with either the Member, the Member and the Delegate, or the Delegate on the Member's behalf ("Strategy Meeting"). These Strategy Meetings may be used to:

   a. Review and apply Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content;

   b. Draw on the Executive Partner's professional experience to advise the Member in the context of the Member's issues; and

   c. Develop, discuss the progress of, or evaluate the Member's Member Value Plan.

2. **Optional Substitutions for Strategy Meetings ─** Each of the following architected sessions are available to the Member for their use during the contract period. The Delivery Team will work with the Member to determine which, if any, of these sessions would be of value for inclusion in the Member Value Plan. Each session used by the Member will count as one (1) of the four (4) Strategy Meetings to which they are entitled annually. Participation in these sessions is limited to the Member and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member must be present and the purpose of the session must be to advance the Member's agenda. Each of the following sessions may be used once per contract year:
    a. **Onsite Analyst Briefing ─** Member meets on AGENCY premises with a BIDDER'S Analyst for a half-day for knowledge-based, individual or project advisory assistance, typically involving delivery of BIDDER'S Content.
    b. **Executive Programs Workshop ─** Member meets on AGENCY premises with BIDDER'S Executive Programs Expert for a half-day facilitated workshop focusing on the application of BIDDER'S Executive Programs Research and action planning. Topic for the workshop will be selected by the Member and the Delivery Team from a list of available Executive Programs workshops and participation will be limited to 25 (twenty-five) Members and/or team members.
    c. **Contextualized Targeted Research ─** On an as-needed basis, the Delivery Team will e-mail to the Member or Delegate selected Research which has been synthesized and put into the Member's context, based on the Member Value Plan.

c. • **Advisory Services**

1. **IT Executives Analyst Inquiry ─** Provides the Member and the Delegate with access to BIDDER'S Analysts who are associated with the Service purchased by the AGENCY.
    a. Participation in Analyst Inquiry is limited to the BIDDER'S Analyst, the Member and/or the Delegate, and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member and/or the Delegate must be present on the Inquiry call and the purpose of the Inquiry call must be to advance the Member's agenda.
    b. Participation in Analyst Inquiry as part of this Service is subject to the terms set forth in the Usage Guidelines for BIDDER'S services posted online.
2. **Executive Programs CIO Research Inquiries ─** Inquiry access to BIDDER'S Executive Programs CIO Researchers through IT Executives Analyst Inquiry; limited to topics covered in Executive Programs Research Reports, as published by BIDDER'S Executive Programs.

d • **Events**

1. **Symposium ─** Two (2) complimentary invitations for attendance to BIDDER'S Symposium, including all standard Symposium attendee rights plus Executive Programs VIP access. These invitations are non-transferable except within the client organization between the Member and their named Delegate.
2. **Exclusive Executive Programs Events ─** Complimentary non-transferable invitation for attendance, by the Member only, at local content-based events in Member's region or country.

e. • **Networking**

1. **Facilitated Networking ─** Member may request meetings or conference calls with peers around a specific topic/issue in order to exchange information about best practices or areas of expertise. Available to the Member only.
2. **Online Networking ─** Access to Peer Connect.

VI.3.8. Line Item # 8 - IT EXECUTIVES CIO ESSENTIALS

IT Executives CIO Essentials (the "Service") is intended to assist the most senior-level IT executives in operating their business as cost-effectively as possible.

DELIVERABLES – IT Executives CIO Essentials Deliverables:

Client may designate one "Member," who has access to the Deliverables described below.

a. • **Content**

1. **Executive Programs Research Reports ─** Up to 12 (twelve) Reports per year; covering topics selected such as IT Governance, Business Value of IT, Architecture, and other areas where business and IT intersect.
2. **BIDDER'S Program for IT Executives ─** Targeted role-specific content, such as pod casts, video casts, polling, and top research picks accessed via any of the BIDDER'S IT Executives role Web sites.
3. **Teleconferences ─** Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.
4. **Access** to BIDDER'S Core Research.
5. **Access** to BIDDER for IT Leaders content and role pages.
6. **Talking Technologies Series ─** Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to online or downloaded to listen to in MP3 format.

b • **Assigned Service Delivery Team**

A service delivery team ("Delivery Team"), consisting of an Executive Advisor and an Executive Client Manager, will be assigned to the Member and their respective Delegate, and will serve as the Member's primary points of contact for all of the resources available under this Service. The Delivery Team will work with the Member to develop a plan (the "Member Value Plan"), which will highlight value sought; identify key issues on which delivery of the Member's Service may focus; and outline how the Service can effectively deliver that value. Progress against the Member Value Plan will be reviewed during the contract year as follows:

1. **Review Meetings ─** Up to two (2) times per year, the Executive Advisor will meet face to face with the Member (the "Review Meeting"). These Review Meetings may be used to:
   a. Review and apply Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content;
   b. Understand the Member's current initiatives; and
   c. Develop, discuss the progress of, or evaluate the Member's Member Value Plan.

c. • **Advisory Services**

1. **IT Executives Analyst Inquiry —** Provides the Member and the Delegate with access to BIDDER'S Analysts who are associated with the Service purchased by the AGENCY.
    a. Participation in Analyst Inquiry is limited to the BIDDER'S Analyst, the Member and/or the Delegate, and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member and/or the Delegate must be present on the Inquiry call and the purpose of the Inquiry call must be to advance the Member's agenda.
    b. Participation in Analyst Inquiry as part of this Service is subject to the terms set forth in the Usage Guidelines for BIDDER'S services posted online.
2. **Executive Programs CIO Research Inquiries —** Inquiry access to BIDDER'S Executive Programs CIO Researchers through IT Executives Analyst Inquiry; limited to topics covered in Executive Programs Research Reports, as published by BIDDER'S Executive Programs.

d • **Events**

1. **Symposium —** One (1) complimentary invitation for attendance by the Member only to BIDDER'S Symposium, including all standard Symposium attendee rights plus Executive Programs VIP access. This invitation is non-transferable.
2. **Exclusive Executive Programs Events —** Complimentary non-transferable invitation for attendance, by the Member only, at local content-based events in Member's region or country.

e.• **Networking**

1. **Facilitated Networking —** Member may request meetings or conference calls with peers around a specific topic/issue in order to exchange information about best practices or areas of expertise.
2. **Online Networking —** Access to Peer Connect.

VI.3.9. Line Item # 9 – <u>BIDDER IT REFERENCE</u>

IT Reference provides clients with access to all Research published via BIDDER'S group. The Service requires that client maintain a threshold minimum investment in one or more of the following BIDDER products: IT Executives, IT Leaders, IT Leaders Workgroup, IT Associates, Industry Advisory Services, Industry Advisory Services Workgroup, or Core Research.

DELIVERABLES – BIDDER IT Reference Deliverables:

Each office designated by Client, which is comprised of licensed IT staff members, including CONTRACTORs and SUB-CONTRACTORs ("IT Staff"), and as specified below in this Service Description, receives a range of written reports, including:

a. • **Published Research ─** Focusing on application platforms, collaboration and content management, data center, data management, identity and privacy, network and telecom, and security and risk management.

b. • **Reference Architecture ─** Web-based tool that assists in making informed strategy and architecture decisions in the technological and organizational environment.

c. • **Tele-briefings ─** Periodic meetings (via phone or Web) where BIDDER'S Analysts speak on timely IT topics in and respond to questions from listeners.

VI.3.10. Line Item # 10 – <u>BIDDER IT ADVISOR</u>

BIDDER'S IT Advisor provides clients with access to all Research published via BIDDER'S online website and the option of scheduling dialogues with BIDDER'S Analysts. The service requires that client maintain a threshold minimum investment in one or more of the following BIDDER products: BIDDER for IT Executives, BIDDER for IT Leaders, BIDDER for IT Leaders Workgroup, BIDDER for IT Associates, Industry Advisory Services, Industry Advisory Services Workgroup, or Core Research.

DELIVERABLES – BIDDER IT Advisor Deliverables:

AGENCY may designate certain offices within its organization that are comprised solely of IT staff members, including employees, CONTRACTORs and SUB-CONTRACTORs to receive a range of written reports, including:

a. • **Published Research ─** Focusing on application platforms, collaboration and content management, data center, data management, identity and privacy, network and telecom, and security and risk management.

b. • **Reference Architecture ─** Web-based tool that assists in making informed strategy and architecture decisions in the technological and organizational environment.

c. • **Tele-briefings ─** Periodic meetings (via phone or Web) where BIDDER'S Analysts speak on timely IT topics in and respond to questions from listeners.

d. **Analyst Dialogues ─** Access to BIDDER'S Analysts who are associated with the service purchased by the AGENCY. Participation in Analyst Dialogues is subject to the following terms:

1. Licensed Users with Advisor-level access may engage with a BIDDER Analyst to:
   (i) Discuss a BIDDER Research document published within the scope of their specific Service, and/or
   (ii) Apply a BIDDER Research document to a related issue their company is facing.
2. Participation in Analyst Dialogue is limited to the Licensed User(s) and the BIDDER Analyst only (i.e., non-Users, inside or outside the AGENCY, may not attend or otherwise participate on the call).
3. Analyst Dialogue sessions may take up to 60 (sixty) minutes of an Analyst's time and may also be used to request basic technology reviews of business-related documents of 20 (twenty) pages or less that take up to 60 (sixty) minutes of an Analyst's time. Examples include technical architecture proposals and marketing or business plans.

e. **Event Tickets ─** Two (2) tickets to a BIDDERS Catalyst Event. Tickets are transferable within the AGENCY organization but may not be used for other BIDDER events, including BIDDER Summits and BIDDER Symposium. Tickets may not be transferred to another AGENCY.

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