## II. INTRODUCTION

The dramatic changes taking place in the marketplace clearly point to a future where government at all levels will need to be able to conduct business electronically. The concept of eGovernment provides an important model for communication and interaction with and between government agencies to take place more efficiently and with increased levels of customer service. It is South Carolina's goal to promote the use of eGovernment and increase the adoption of electronic services by and between state agencies.

eGovernment should:
- Be centered on the Citizen or Event: A holistic solution rather than a solution focused on individual agencies or departmental solutions. Citizens view state government as a single entity. eGovernment should facilitate the removal of barriers between agencies and departments. It should permit citizens to receive services without navigating a maze of unconnected and duplicative Internet sites.
- Enable Self-Service: eGovernment is more cost effective than most traditional methods. A solution should provide incentives to citizens to use the most cost effective channel of doing business with the state.
- Increase Government Productivity: eGovernment should encourage interagency data sharing and communications. It should enable electronic collaboration and reduce service delivery costs.
- Address Security and Privacy Concerns of the Citizenry. Citizens want to be assured that eGovernment protects their privacy and is secure.
- Be Convenient: eGovernment's goal is to be open 24 x 7 x 365, provide once-and-done processing, be accessible from virtually anywhere, and utilize multiple methods of access (phone, PCs, PDAs, etc.)

In order to improve on South Carolina's current eGovernment portal, the Budget and Control Board's Division of the State Chief Information Officer (CIO) plans to reconstitute MySCgov.com to a more robust system that will provide online information and services to citizens, business, employees, and other communities of interest via an enterprise-wide Web based "portal".

### Background

Developed in 2000, MySCGov.com serves as an entry point to online government within South Carolina. MySCGov.com classifies information by subject matter and provides links to the appropriate agency web pages. It also provides some online transaction services including a credit card transaction engine for processing eCommerce activities. These services have become an integral part in citizen-to-government interaction.

However, the current portal does not offer:
- Content management capabilities for effectively managing ownership, deployment and content of Internet Web displays;
- A comprehensive search engine to enable timely and effective location of information;
- Effective performance infrastructure to ensure a reliable, available and serviceable environment for these mission critical applications.

Most critically, the application platform upon which MySCGov.com was written, Haht, is no longer supported by its manufacturer.  Additionally, there is a lack of redundancy for the MySCGov.com site that substantially increases the risk of downtime for these mission critical applications.

### III. SCOPE OF WORK

The CIO seeks options for implementing a new portal that will enable the State to continue to move toward citizen-centric government. The CIO is open to a variety of technical and business options to meet the state's portal needs. Responses should include both technical approaches and funding modelsbusiness plans proposed by the vendor.

#### A. Overview

The project priorities include:

1. Migrating existing ecommerce applications from the Haht platform
2. Migrating existing portal applications and content from the Haht platform
3. Upgrading the existing State portal, MySCGov, to ensure the portal is citizen-centric and that government services and transactions are easily and quickly found. The site will be comprehensive, well mapped, and easily navigated
4. Extending the services of the State portal to encourage online government-to-government collaboration and transactions as well as citizen-to-government collaboration and transactions

#### B. Project Goals and Objectives

This project is divided into two Lots: Lot 1 is limited to satisfying the State's electronic commerce requirements. Lot 2 includes all the electronic commerce requirements in Lot 1 plus the State's portal requirements. The State may award either Lot 1 or Lot 2. The Lots include, but are not limited to, the following:

Lot 1 - Electronic Commerce Solution
1. Migrate current credit card transaction process off offrom the unsupported Haht server to a stable platform.

2. Enterprise-wide, integrated, secure eCommerce systems which provide applications that include electronic storefronts, catalogs, financial transaction processing, etc. that meet the following requirements:
   - both hhosted or premised deployments
   - integration support for mixed platform environments
   - a two-tiered database based authentication system
   - industry standard Advanced Encryption Standard (AES) for 128 bit encryption of sensitive data
   - custom application specific identifiers; i.e., SSN, tracking number, etc.
   - open standard application programming interface (web services (SOAP), XML file based, Web page pops)
   - multi-channel access (Web, PC, Kiosk, IVR, etc.)
   - real time and batch processing
   - real time payment authorization
   - secure sensitive payment data for individual applications
   - a common payment system
     - designed to distribute revenue back to state agencies
     - capable of splitting funds and transferring monies to multiple agency accounts when processing online transactions using the policies, procedures and standards defined by the State Treasurer's Office;

- - that interfaces with the State's centralized financial accounting system, STARS (Statewide Accounting and Reporting System);
  - that provides data file transfer (flat file), both to and from, for agencies not using the State's financial accounting system; agencies will handle the transfer of data into and out of their systems;
  - that includes a customizable backend funds accounting/disbursement process that allows for each transaction to have single or multiple deposit accounts
- recurring payments (support dynamic recurrence patterns; i.e., weekly, biweekly, monthly, yearly, specific days of the week, month, year)
- enrolled and unenrolled payments as specified by the participating agency
- payment cancellation; i.e., refunds, charge backs; must accommodate charge return items against multiple chargeback accounts; must accommodate ACH payment "kills" by the customer at any time prior to settlement
- electronic funds transaction processing for: 1) credit cards, 2) debit cards, 3) ATM cards, 4) eChecks, and 5) ACH
- most credit card, debit card, ATM card, eCheck and ACH processors, including MasterCard, Visa, Discover and American Express
- personal and corporate card support
- compliant with Card Holder Data Security such as Visa's CISP, MasterCard Site Data Protection, American Express Data Security Standards
- multi-bank support, payment warehousing, automated NOC and NSF management, NACHA and Reg E Compliancy
- messaging process that is used to move transactions from the credit card application to the financial institution. In the event of a communication error, describe how the transaction retransmits. Describe the transaction assured delivery process.
- fraud screening including AVS, CVV2, CVC2, as required by card processing entity
- uniform settlement and reporting processing
- supports multiple processors for a single installation
- automated Settlement processing that allows for independent settlement date and time to be configured by each agency/system
- fulfillment processing that is triggered by time of day
- daily reconciliation of payment transactions with banking receipts

multiple layers of fraud detection services including: identity verification, registration model, negative database checks, unusual activity screening guaranteed check processing
- online payment research capabilities to include the following:
  - dynamic payment search (by date ranges, site, agency, agency application, confirmation number, customer identifiers, account number, payment type)
  - view payment history including: payment status history, related payments, notes
  - issue chargebacks and/or refunds
  - view settlement activity

- o demonstrate available online reporting functionality
- o optional guaranteed check processing
- o optional added notes to payment history
- convenience fee processing, such as discount fee, transaction cost, etc., as required by the participating agency

3. Supply documentation (user, system, program, maintenance and management) and training for each proposed solution.

4. The State currently has a contract with First Data Merchant Services for processing credit cards. At a minimum, the proposer must be able to interface with First Data Merchant Services.

The eCommerce solution project will be considered complete when
- all existing ecommerce applications have been migrated from the current Haht platform
- the ecommerce gateway can be extended to support other agency ecommerce applications

Once the above eCommerce components have been delivered, projects will be established as needed for the ongoing maintenance, management, addition of new applications, etc.

## Lot 2 - Portal Solution

1. All items included above in Lot 1, Electronic Commerce Solution.

2. Migrate existing e-government applications (identified on page 11, Current eGovernment Applications Running on the Portal) from the Haht platform to a standard application.

3. Provide a single, unified point of entry to all state services, permitting citizens to receive services and increase access without having to navigate a maze of unconnected and duplicative Internet sites.

4. Change the look and feel of the current web portal. Permit the ability for the State to adopt a common South Carolina look and feel, extending and clarifying its brand and brand message. Support a structure that is comprehensive, well mapped and easily navigated by the clients who will be using the web portal.

5. Provide a Web-based interface to information and services that take advantage of directories, tutorials, help functions, and other tools that make it easy for visitors to the site to navigate, locate, and select information and services on the portal.

6. Increase ease and convenience for business and citizens to conduct transactions with state government online. Accelerate the development and delivery of an increased volume of quality, online government services. Minimize the cost to taxpayers for the development and deployment of online transactions with state government.

7. Implement a solution suite that works together to enable applications that can search, classify, present, and integrate relevant information across agency lines.

8. Ensure flexibility in providing web-based interfaces to agency applications, interfacing via "feeds" to legacy systems, and/or linking to existing agency web-based information and services.

9. Improve the level of customer service from state government;
10. Accommodate existing legacy applications in agencies.

11. Enable agencies to add applications as they are developed.

12. Provide tools that are customizable, employ a flexible architecture, and transparent to the user.

13. If applicable, offeror must specify tools to be used by the State to build future portal applications. These tools need to conform to the State's architectural plans.

14. Enhance Search capability to all State government sites, multiple data repositories, structured and unstructured data; internal and external data.

15. Increase security with personalization and authentication based on open systems standards that supports a standard directory protocol (LDAP) to allow for connection to multiple Contractor-provided directories.

16. Ensure integration with LDAP-compliant directory services.

17. Provide the ability to pass authentication to other secure systems in a secure manner as needed for application level authentication.

18. Provide a self-service content management and publication system which will allow multiple portal and portal users/administrators to contribute and/or publish information (content).

19. Provide the ability to create newsletters, templates, surveys and forms.

20. Accommodate an electronic workflow process (task setup, assignment, forward in sequence, approval, etc.).

21. Provide collaboration tools such as instant messaging, shared workspace, workflow, automatic notification, and discussion forums to support internal and external business processes.

22. Provide the ability to grow exponentially, if necessary, to meet emerging requirements; i.e., reach out to mobile technologies and users with wireless devices, including cell phones, personal digital equipment, etc.

23. Adhere to any published State IT architectural standards.

24. Comply with accessibility standards for electronic and information technology under Section 508 of the Rehabilitation Act, as amended.

25. Assure Health Insurance Portability and Accountability Act (HIPAA) compliance.

Advertisements on the State's web portal are prohibited.

This project will be considered complete when
a.  all existing ecommerce applications have been migrated from the current Haht platform
b.  the ecommerce gateway can be extended to support other agency ecommerce applications
c.  all existing portal applications and content have been migrated from the Haht platform
d.  the existing State portal, MySCGov.com, has been upgraded to ensure a common "look and feel" that is citizen-centric, and government services and transactions can be easily and quickly found
e.  the services of the portal can be extended to other governmental entities to encourage online government and government-to-government and citizen-to-government collaboration/transactions

Once the above components have been delivered, projects will be established as needed for the ongoing maintenance, management, addition of new applications, services, etc.

## C.     Architectural Considerations

Any proposed solution that resides within the State infrastructure as identified in the attachment must include an architectural design that integrates with the State's IT infrastructure and ultimately must be approved.

The request for payment processing function must support data exchange from Java application servers and XML-compliant application servers to support WebSphere-based and Microsoft-based applications.

Payment processors do not adhere to a standard protocol; therefore, snap-in proprietary protocols must be supplied to support the major industry payment processors; i.e., Visa, Verisign, Wachovia, etc.

The directory services protocol to allow for connection to multiple offeror-provided directories shall be a consideration.

All proposed options must be available 24 x 7 x 365, scalable, and reliable, with 99.99% uptime and a response time less than 5 seconds.

**D.** **Governance**

The State CIO established an Enterprise Web Portal and eCommerce steering team to guide this project. The Division of the State CIO will serve as the contract administrator. The Contractor will execute the project under the direction of this steering team. The project steering team (which is comprised of ncludes the contract administrator and participating agencies), along with the Contractor, will determine the manner in which services are to be developed and will monitor performance under the contract. They will also work with SC Enterprise Architecture Oversight Committee (AOC) that approves all technology standards for the State.

If applicable, the contract steering team will review and approve all charges and disbursement of user charges that may be proposed; i.e., transaction based charges, subscription based charges, convenience fees, value added fees, etc.

Government agency and departmental participation in the State's Enterprise Web Portal and Ecommerce project is voluntary.

**E.** **Project Management**

The State has adopted a project management methodology based on principles set by the Project Management Institute (PMI). It is strongly believed that a competency in sound project management principles is critical to the success of any project awarded by the State. Therefore the successful Offeror should demonstrate a competency in this area, including project management methodology, supporting tools, and qualified project managers.

**F.** **Current Environment for MySCGov.com**

This description of the current environment includes information about the systems that are required for the operation of MySCGov.com. It does not include the operating environment for agencies linked via the portal.

**A. Platforms**

The current MySCGov.com portal utilizes four distinct platforms:
- AltaVista search engine and mail server running on a Sun Solaris
- Netscape Directory Server running on a Sun Solaris
- IPlanet Web Server running on a Sun Solaris
- Haht application server running on a Windows NT 4.0

The portal is built on the Windows NT Haht application server platform. Haht has discontinued service of this product. Additionally, the product is not J2EE compliant. Additionally, the current hardware platform has no redundancy built in. Existing applications cannot be moved to another application server without being rewritten.

The MySCGov portal functions in two modes:
**Public**
When no login session is initiated, the portal consists of a number of static pages that were created during a publish process. This "publish" process draws content and presentation properties from attributes stored in the Netscape LDAP directory. The local static content exists entirely on the IPlanet Web server.

**Private**

Private mode is entered when executing the personalized ICON JSP. When login session is initiated, a Haht application matches user profile information with presentation properties (both of which are stored in Netscape LDAP directory) to create dynamic portal views. This Haht application consists of a combination of Java classes executing on a Windows NT platform and static content residing on the IPlanet Web Server. Communication from the portal application to end users is usually executed through programmatic interface to a mail server running on a Sun Solaris platform.

"Links to" and "Content from" are also drawn from a number of other sites in and out of State Government.

The MySCGov.com web site traffic was calculated on March 31, 2003, and was an average of 23,000 hits per day. During peak hours, there were 1000 simultaneous hits.

**B. Portal Infrastructure**
The following is a summary review of the CIO's current portal infrastructure:
a. Application Server**--provides a method to store and access application programs**
The CIO currently employs three application servers that support internally written web applications: WebSphere on the OS/390 operating system; WebSphere on the AIX/UNIX operating system; and HAHT on the Solaris UNIX operating system

b. **Authentication and Directory Services**—provides programs to perform the user authentication function, stores user IDs and passwords, and security access fields

Directory services are provided via Netscape Directory Server 4.16 (Build 02.079.1031) running under a Sun Solaris OS. The Haht environment consists of a Windows NT 4.0 Application Server and an IPlanet Web server running on a Sun Solaris system.

**Current IPlanet Directory and Field Definitions**
Primary containers defined beneath the organization object "state.sc.us" are
o Devices—container holding printers
o Groups—container holding groups used for defining application security policies and newsletter subscription membership
o Personnel Administrators—container holding groups used for defining update authority on user and printer objects. These roles are enforced by Group Access (bind rules to specify that access to a targeted entry will be granted or denied only if the user binds using a Distinguished Name that belongs to a specific group.
o Policy Administrators—container holding groups used for the distribution of security policies through the Pentasafe Policy Center
o Portal Menus—container holding menu objects used in defining tailored portal views based on user preference
o SCSG Employees—container holding public user objects created through the portal

- o SCSG County Employees—container holding county employee user objects
- o SCSG Municipality Employees—container holding municipality user objects

The LDAP directory contains 70,000 users (30,000 external and 40,000 internal).  Users are not required to sign on to the portal for general public access.  User password authentication is required for specific applications.  Authentication is not passed to links not controlled by the CIO.

Multiple directories exist, creating multiple sign on activity for users that span those applications where required.  There are currently 45 known directories throughout State Government.  These directories address the central services group, not directories in each agency.  Known directory types include the following:

**Novell GroupWise and Novell's LDAP support the mail system**
NDS Version 7.57 and 7.60
NDS authentication (no LDAP for NetWare file and print services)
NetWare 5.1
Number of instances                            =        1
Defined Users                                           =            770
Number of users in IPlanet Directory)         =        770

**OS390 RACF supports legacy applications**
Number of instances                            =        17,468
Defined users                                           =        100,000 $\geq$
No LDAP directory
FMID HRF7703

**Microsoft Active Directory supports CWOF and CITRIX**
Number of instances                            =        2
Number of users in LDAP                               =        130
CWOF is a Windows 2000 Advanced Server Active Directory with Citrix XPa.  The total number of Citrix licenses is 130, split between two load-balanced servers (CWOF1 and CWOF2) with Active Directory running on CWOFLB.  The login to CWOF is setup as one generic user which is configured with Web pages to attach to the Oracle database.

**Authentication**
Authentication is an in-house application that runs on the Haht application server.  Authentication is performed for users "personalizing" their access.  Personalization is a cross-referenced menu objects with groups of users.  If you are a member of a group granting access to an application, that menu will be a component of your portal "view."   Users can minimize or hide menus from their portal view.

Most applications present different options/views depending on the type of user that is signed on and what privileges that user has been assigned for that application.

The portal links to other State Government agency servers that use their own authentication and LDAP directories.

c. **Web Server**—delivers the application to the end user and communicates with the application server
The CIO has two web server applications: WebSphere is providing the web server function for the OS/390 and AIX/UNIX systems, and iPlanet from Sun MicroSystems performs the web server functions for the HAHT systems

d. **Search Engine**—crawls Web sites to index their content, providing the end user with the ability to find information based on their search criteria
Alta Vista provides the current search functions for the MySCGov.com site. It has a license limitation of 100,000 pages. Alta Vista runs on a separate Sun E250 server.

e. **Data Storage**—stores data created by applications, requiring a data structure method
The HAHT application server uses IBM DB2 as the data structure method. This requires a separate server supporting the DB2 database software. To support access to DB2 from multiple servers and to support the communication between the servers requires a DB2 Connect gateway. Mainframe database access from a HAHT application server is accomplished the standard ODBC interface.

f. **DMZ Security**—establishment of a dual firewall protection method whereby the authentication function runs on a separate server from the application server. The application server is protected by a second firewall, limiting the ability of a hacker to access the application server.

g. **Existing Credit Card Contract**
The State Treasurer's Office currently has a contract with First Data

Merchant Services for processing credit card transactions.

**Current E-government Applications Running on the Portal**

| Customer | Software | Web Application | Function |
|---|---|---|---|
| | | | |
| CIO | HAHT | State Portal | State Portal |
| CIO | HAHT | LDAP - Unix DB2 | Web Security Administration |
| | | | |
| **Customer** | **Software** | **E-Commerce - Custom Store Front** | **Function** |
| Archives & History | HAHT | Gift Shop Store Front | |
| OGS | HAHT | State House Souvenirs | Custom Developed gift shop store front |
| State Museum | HAHT | Cotton Mill Exchange | Custom Developed gift shop store front |
| ALL | HAHT | Gateway | Credit Card Processing |
| | | | |
| **Customer** | **Software** | **E-Commerce - Gateway** | **Function** |
| CIO | HAHT | E-Commerce admin/reports/gateway | |
| Clemson | HAHT | Publications | Gateway Template |
| Clemson | HAHT | Clemson Apparel | Gateway Template |
| Clemson | HAHT | IPTAY | Gateway Template |
| Clemson | HAHT | Housing Payment | Gateway Template |
| Clemson | HAHT | Orientation | Gateway Template |
| Clemson | HAHT | Parking Services | Gateway Template |
| DOR | HAHT | DORBOS- Registration | Gateway Template |
| DOR | HAHT | DORePay - Tax Payment | Gateway Template |
| DOR | HAHT | SCnetFile – Individual Income Tax Payment | Gateway Template |
| ETV | HAHT | Video and Book Sales | Gateway Template |
| Francis Marion | HAHT | Tuition Payment | Gateway Template |
| Lander | HAHT | Tuition Payment | Gateway Template |
| Lexington County | HAHT | Tax Payments | Gateway Template |
| LLR | HAHT | Nurses License Renewal | Gateway Template |
| LLR | HAHT | Chiropractic Examiners License Renewal | Gateway Template |
| LLR | HAHT | Speech-Language Pathology and Audiology License Renewal | Gateway Template |
| LLR | HAHT | MEDICAL EXAMINERS License Renewal | Gateway Template |
| LLR | HAHT | VET MEDICAL EXAM BRD License Renewal | Gateway Template |
| LLR | HAHT | OPTICIANRY EXAMINERS License Renewal | Gateway Template |
| LLR | HAHT | OPTOMETRY EXAMINERS License Renewal | Gateway Template |
| LLR | HAHT | OCCUPATIONAL THERAPY License Renewal | Gateway Template |
| LLR | HAHT | PHYSICAL THERAPY EXA License Renewal | Gateway Template |
| LLR | HAHT | SOC WK EXAMINERS BRD License Renewal | Gateway Template |

| | | | |
|---|---|---|---|
| LLR | HAHT | Real Estate Commission License Renewal | Gateway Template |
| MUSC | HAHT | Contin Ed Payment - not used | Gateway Template |
| SC Dept of Commerce | HAHT | Industrial Directory | Gateway Template |
| SC Dept of Commerce | HAHT | SE Rural Summit | Gateway Template |
| SC Dept of Commerce | HAHT | Film - not used | Gateway Template |
| SC Dept of Commerce | HAHT | SE Seus Japan - not used | Gateway Template |
| | | | |
| | | | |

**Transaction Volume from E-Commerce Activity:  FY03**

| Agency | Number Transactions Per Year | Total Dollars | Average Transaction Amount | Percent of Total |
|---|---|---|---|---|
| DOR* | 5,020 | $2,184,508 | $435.16 | 38.11% |
| Lexington Property Taxes | 3,283 | $1,224,220 | $372.90 | 21.35% |
| Clemson | 5,493 | $1,022,131 | $186.08 | 17.83% |
| LLR ** | 15,501 | $687,696 | $44.36 | 12.00% |
| Francis Marion | 321 | $383,180 | $1,193.71 | 6.68% |
| SCETV | 2,196 | $106,099 | $48.31 | 1.85% |
| Lander University | 92 | $88,504 | $962.00 | 1.54% |
| SC Dept of Commerce | 158 | $12,422 | $78.62 | 0.22% |
| SC Governors Cnf | 79 | $10,793 | $136.62 | 0.19% |
| State Housing Authority | 73 | $7,000 | $95.89 | 0.12% |
| * State Museum | 71 | $3,200 | $45.07 | 0.06% |
| * Archives & History | 56 | $2,172 | $38.79 | 0.04% |
| * OGS | 13 | $807 | $62.07 | 0.01% |
| **Averages** | **32,356** | **$5,732,730** | **$177.18** | |

*It is anticipated that the DOR transactions will double and the dollar amount will be 10 times as much during the current fiscal year.

** LLR anticipates an increase in renewals beginning in January.

**IV.** **PROPOSAL RESPONSE**

Each proposal shall be prepared simply and economically, providing a straightforward, concise delineation of the Offeror's capabilities to satisfy the requirements of this RFP. Emphasis on each proposal should be on completeness and clarity of content.

To expedite the evaluation of proposals, it is essential that Offerors follow the format and instructions as stated below. As a minimum, Offerors should state each item and respond directly below the item.

**Discussion of Lots**

As stated in Section III, Scope of Work, Item B. Project Goals and Objectives, the goals of this project are divided into Two Lots. An Offeror may submit a response for one Lot or both Lots. The CIO and the portal team will evaluate each proposal based on the Offeror's proposed solution and reserves the right to make an award for Lot 1 or Lot 2.

**A. Cover Letter**

Offeror is to provide a cover letter identifying Offeror's key point of contact, telephone number and email address where contact may be reached. Cover letter shall be signed by an official of the company authorized to bind the Offeror and indicating the Offeror's intent to be bound by the contents of its submission for a period not less than the time stipulated in this RFP.

**B. Functional Requirements**

The CIO is requesting that Offerors provide a solution that will meet the requirements stated in this RFP. Describe options for the implementation and management of the State's Web portal and/or ecommerce systems. Include all functionality that will be provided with each option proposed. Offeror is to address all the functional requirements and at a minimum, the following items:

1. Offeror is to tell how its solution will help the State achieve the project goals and objectives listed herein taking into consideration the desired functions and features as well as the architectural considerations. Offeror may address one Lot or both Lots listed in Item B. Project Goals and Objectives. Offeror should clearly indicate which lot its proposal is addressing. If both lots are being bid, clearly separate information for each.

2. Offeror must clearly state whether or not each function, feature, requirement, etc., addressed in this document can be provided.

3. Describe the architectural design for the proposed options to include any necessary hardware, software, system design and support, security, account administration, billing, reporting, etc. The proposed design should be based on specifications detailed in this document. Should the proposer offer a solution that is based on a differing architecture that results in additional costs, the State reserves the right to assign those additional costs to the proposal.

4. Provide solutions that meet industry open standards that enable interactive exchange.

*5.* Offeror is to identify all staff that will be assigned to this project for each solution proposed. All staff will require the approval of the state's project steering team prior to being assigned to the project.

6. Offeror will be responsible for communications links for any solutions that require communications links from State facilities to offeror's facilities.

7. Define ownership options of any proposed systems.

8. The State retains the rights and ownership to all State data. All data and other records entered into any database of the State or supplied to the vendor by the State are, and shall remain, the sole property of the State. The vendor shall not copy or use such records without the State's written consent except to carry out contracted work, transfer such records to any other party not involved in the performance of the Agreement, and shall return submitted records to the State upon completion of the work.

9. The State requires full access to and use of all application source code (customized applications specifically written for the State). The State would prefer ownership of all application source code.

10. If applicable, define your Offeror is to include a sample Service Level Agreement and how you plan to manage the Agreement. that addresses overall portal/ecommerce systems availability and performance, security management performance, application availability, data repository and data recovery.

11. For each proposed solution for Lot 1, Electronic Commerce Solution, offeror is to provide an approach, as well as a complete timeline for the implementation, to include milestones and deliverables.

12. For each proposed solution for Lot 2, Portal Solution, offeror is to provide an approach, milestones, deliverables, and estimated timeline for implementation. An approach and estimated timeline for the portal should be based on previous experience with similar implementations.

13. Offeror must have completed a minimum of two similar projects. For each proposed solution, provide documentation of these implementations, as well as references.

14. Outline level of support to be provided by Contractor and Help Desk location, staffing levels, policies and procedures.

15. Offeror is to detail the level of commitment of State resources upon which the Offeror's proposed solution is based.

16. Offeror's proposal should include a detailed description of its proposed training plan.

17. If applicable, offeror is to provide a migration plan to transfer the portal to the State or the State's selected vendor at the end of the contract period.

18. Offeror is to describe any portal/ecommerce applications that it has deployed in other states and will provide as part of its proposal.

## C. Qualifications and Experience

1. The Offeror will include details of background, size and resources of its company.

2. Offeror shall provide a complete list of its customers, past and present, and identify those customers for whom the Offeror has completed projects of similar size, scope, and functionality to demonstrate its ability to manage and operate an enterprise Web portal and ECommerce system. Include the customer name, address, and customer contact. Each reference must currently use a similar product or service to that being proposed. The state has the right to contact any reference as part of the evaluation and selection process.

3. Provide a list of key personnel that will be assigned to this project, their assigned role and resume demonstrating their qualifications and experience. Key personnel assigned to this project may not be reassigned by the contractor to any other project prior to the acceptance of the proposed solution by the State without the express written consent of the State. If subcontractors are to be used, identify and supply qualifications and prior related experience of the subcontractor and subcontractor personnel.

4. The Offeror shall also provide the most recent annual report, audited financial statements for the last three years, along with other evidence of the Offeror's financial status and financial ability to carry out the project. All evidence under this requirement shall be in sufficient detail to allow an adequate evaluation by the state's RFP team. Acceptable evidence shall include, but shall not be limited to, recent financial statements from a bank evidencing Offeror's good standing, last two years audited financial statementsany Dunn & Bradstreet Ratings, etc.

5. Offeror shall disclose entities or persons who have a substantial financial interest in the Offeror of more than five percent (5%) equity.

6. Offeror must provide a complete list of any lawsuits or pending legal actions, which affect or may affect the Offeror, which have taken place during the past 24 months. The list should include the status and the disposition of the action.

7. Offeror shall identify any South Carolina Small and Minority Owned Businesses that will be used in this project, as well as any other subcontractor that may be a South Carolina based vendor.

8. Offeror shall identify if it is or has ever been suspended/debarred from doing business with the Federal Government or any other governmental entity.

## D. Risk Management

Offeror is to provide an analysis of risks associated with its proposed solution. Identify each risk, its source and the steps that can be taken by each stakeholder to

eliminate or reduce the risk. Offeror is to include these tasks in it proposed project plan as well as business plan for this project.

**E. Business Plan**

The State is open to considering a variety of business offerings, including but not limited to web tools that enable the development of a portal in-house, contractor-developed/CIO hosted solutions, or completely outsourced solutions. Offerors may propose more than one option.

For each option proposed, include a business plan that thoroughly addresses all the following areas as appropriate:

- implementation plan and schedule
- organization and staffing
- architecture
- security
- problem resolution
- training and ongoing support (infrastructure and customer)
- customer service
- financial plan etc.
- marketing to agencies
- marketing to citizens

Define funding options; i.e., funded, self-funded, hybrid, etc. Offerors must describe how the proposed solution will be funded, developed, and maintained on an ongoing basis. Proposals should address initial funding for development and implementation, ongoing operational funding, and any revenue sharing opportunities.

Business plans should also address risks associated with the proposed solution and any risk mitigation or risk sharing options.

**V.  EVALUATION CRITERIA**

All proposals will initially be reviewed to determine responsiveness. Any proposal that does not meet the material and/or essential requirements of the State will be subject to disqualification pursuant to S.C. Statute, Regulations and Interpretative Authorities.

The State will evaluate each Offeror's proposed solution and reserves the right to make an award either Lot 1 or Lot 2.

All responsive proposals shall be evaluated using the following criteria which are listed in order of relative importance:

A. **Quality of Technical Proposal**

The analysis of each proposed technical solution will include the following:
- Technical merit in meeting the State's strategic and technical requirements,
- detailed plans for meeting the objectives and requirements of the project,
- timeframes for deliverables and tasks,
- previous experience with similar implementations, and
- the probability of success of the project based on proposed risks and risk management.

**B. Quality of Business Plan**

Responses will be evaluated on cost as determined by the evaluators and on the technical merit in meeting the state's strategic and technical requirements and business models that limit the expenditureprovide the best return on the investment of taxpayer dollars and the qualifications/ experience of the vendor on similar projects.

The State will consider a wide range of business options. Potential business solutions may range from a traditional ownership role permitting in-house portal development to a completely outsourced solution. There are many options between these extremes. The other end of the spectrum of possible solutions is for the State to contract with an offeror to provide either or both services with payment on a flat fee or per transaction basis.

Business proposals should describe in detail the costs and benefits to the State for every business alternative proposed. Multiple options may be proposed. For each alternative proposed, costs should be identified such that particular functions/features can be eliminated if determined too costly; i.e., instant messaging, access via PDAs, etc.

The business plan must demonstrate the ability of the Offeror to analyze and manage against realistic cost constraints and revenue opportunities, while meeting the needs as outlined in this RFP. Present a thorough and detailed view of all costs to be incurred during the implementation and useful life of the proposed solution. Should the proposer include solutions that, in the opinion of the evaluators, require the expenditure of additional state funds or resources, these costs will be included also.

**C. Qualifications, Prior Experience, and Performance on Projects of Similar Nature**

The qualifications and prior experience of the vendor and vendor personnel on similar projects will be evaluated. If subcontractors are to be used, identify and supply qualifications and prior related experience of the subcontractor and subcontractor personnel. Prior experience refers to the degree of the Offeror's familiarity and proven experience with this type of contract and a demonstrated ability to provide quality service meeting industry and government guidelines. Qualifications of proposed staff, to include the ability of the Offeror to recruit and retain sufficiently qualified people to maintain necessary performance levels.