Request for Proposal:
Consulting on Digital Preservation and Cloud Services

The Minnesota Historical Society ("the Society") is facing exponential growth in storage required for preservation of digital collections consisting of images, audio, video, text, and other formats. The nature of preservation content is that it must be stored and maintained for future generations in perpetuity. It is not used in transactional applications and it requires little access beyond what is needed for preservation activities such as integrity checks and format migrations. Most of the content is high value -- unique and irreplaceable -- and as such, the files must remain unchanged.

The Society's digital collections are growing exponentially and will likely approach 140 TB by 2015 (at a projected rate of increase of 10-20 TB/year). We are trying to decide the costs and benefits of increasing our existing storage architecture versus purchasing vendor storage services such as cloud storage ("cloud services"). The purpose of this Request for Proposal is to seek consulting services that will explore and document factors to help us determine costs and benefits.

Request

The Society seeks assistance in understanding:

1. Background on content related issues we need to consider when considering use of cloud services. For example:
    a. ownership of files
    b. contractual obligations
        i.   length of contract, terms of service
        ii.   legal liabilities, including liability for loss or excessive downtime
        iii. price increases
        iv.   what are vendor obligations if the business fails
        v.   penalties for early termination
    c. storage and integrity
        i.   data (including backups) is protected against anticipated threats to the privacy, security, loss, integrity (bit rot)
        ii.   are system integrity checks/reports available
        iii. are audit reports for data activity (e.g., upload, download, deletion) and system content available
        iv.   where are data centers located
        v.   where backups are located
    d. disaster recovery
        i.   ability to do a complete restoration in the event of a disaster
    e. retention and portability
        i.   if we decide to discontinue services or if business fails
        ii.   costs for uploads and downloads
    f. availability
        i.   for example with "cold storage" services what should we expect in terms of lead time to access data.
    g. breaches
        i.   how the risk for data breaches will be mitigated and how data breaches will be handled if it were to occur

      h. scalability

      i. data management and preservation functionality

            i. does the system offer functions to facilitate preservation activities such as role-based access/security, content verification/checksum processes, format migration tools, versioning, customizable reporting?

      j. other

2. Who are some cloud services vendors to consider? Provide a review of their services and how well they address issues listed above.

      a. Amazon S3 and Glacier

            i. Are there any issues to consider regarding cold storage, e.g. Amazon Glacier?

      b. Google and Google DRA

      c. Tessella Preservica

      d. Visi

      e. SDSC's Cloud storage

      f. DuraCloud

      g. IBM SmartCloud for State and Local Government & Education

      h. others?

3. What are the costs?
   a. It is desirable to have a matrix of costs by vendor product.
      i. annual costs per 100 TB storage
      ii. upload/download costs
      iii. other associated costs

Product	Annual Cost $ per 100 TB	Upload and Download Bandwidth Costs	Other Associated Costs
Amazon Glacier			
Amazon S3			
Google			
Tessella Preservica			
Visi			
SDSC's Cloud Stoage			
DuraCloud			
IBM			
others ???			

4. What are the recommendations for cloud storage proposed by professional organizations such as the Library of Congress (and the National Digital Stewardship Alliance), Association of Moving Image Archivists (AMIA), Society of American Archivists, (SAA), American Library Association (ALA)?

5. What cloud storage activities are being used or tested in academic, library/archives, and cultural memory organizations?   For example, we have heard about the Vanderbilt Television News Archive and Harvard Moving Images Archive, and the Michigan State Archives' use of Preservica.

6. Are there other issues or data to consider that aren't included here?

Budget
The Society's budget for this engagement is not to exceed $19,500.00

Deliverables
To satisfy this consulting engagement, the Society expects these activities and deliverables:

1. Initial meeting to discuss process, scope, and deliverables.
2. Mid-point check-in to review progress.
3. A written findings report addressing the questions listed above.
4. A meeting to review the findings.

Proposal Format:

1. Description and schedule of proposed work. The work must adhere to the deliverables and specifications listed above.
2. Description of work on comparable projects with client references for those projects.
3. Company profiles and identification of vendor personnel and any subcontractors who will supervise and conduct the work of the project, with details of their training and experience, and where vendor personnel and subcontractors are located.
4. Cost proposal for services detailing the costs and billing for the work to be provided.

Selection Criteria

The vendor for this project will be selected by a team of the Society's Library & Collections Division and the Enterprise Technology Department. Selection will be based on the submitted proposals. Proposals will be evaluated using the following criteria and points:
1. Bidder qualification, technical expertise, knowledge and experience in massive data storage or data preservation solutions. (25)
2. Demonstrated understanding of the Society's needs and environment. (20)
3. Quality and completeness of proposal (20)
4. Indication of the ability to complete work within requested time frame. (10)
5. Appropriate credentials and positive references provided. (5)
6. Cost (15)
7. Minority owned business (5).

Timeframe

The Society wants these deliverables completed by March 1, 2013. The Society will use information gleaned from this proposal to contribute to preparation of its budgets for the 2014-2015 biennium beginning July 1, 2014.

Society Contacts

Questions regarding procedural aspects of this request should be directed to Mary Green Toussaint, Acting Contracting Officer, mary.green-toussaint@mnhs.org, 651-259-3175. Questions regarding the Society's needs and environment should be directed to Shawn Rounds, Head of State Archives, shawn.rounds@mnhs.org, 651-259-3265.

Conditions of Receipt of Proposals

This Request for Proposals does not obligate the Society to award any specific project. The Society and its Board reserves the right to cancel this solicitation or to change its scope if it is considered in the best interest of the Society.

The Society and its Board also reserve the right to waive irregularities in proposal content or to request supplemental information from the prospective vendor(s). All documents in this package do not constitute a legal offer. A legally binding contract will not be formed until all parties involved have fully executed a written contract which incorporates all mutually agreed-upon instructions, specifications, conditions and fees.

Submission of Proposals

All proposals must be received by Mary Green Toussaint, Acting Contracting Officer, or her agent, Minnesota Historical Society, 345 Kellogg Blvd West, St. Paul, MN by 2 p.m. Central Time on January 11, 2013. Proposals may be emailed to mary.green-toussaint@mnhs.org and shawn.rounds@mnhs.org.
Late proposals may not be considered.

PROPOSAL PRICE FORM –Consulting on Digital Preservation and Cloud Services

January 11, 2013

We propose to provide all materials and labor in accordance with the Request for Proposals provided by the Minnesota Historical Society for the not-to-exceed, fixed price of:

_____ ($.   )
(express in words)   (figures)

Personnel	Hourly Rate	Estimated Number of Hours	Total Estimated Cost
_____	_____	_____	_____
_____	_____	_____	_____

Estimated Reimbursables (Itemize)

_____

_____

_____

_____
Individual or Firm Name

_____
Individual or Firm Address

_____
City, State, Zip

_____
Telephone   Facsimile   E-mail

_____
Signature   Date

_____
Name and Title of Authorized Signer