

I E T F[®]

Request for Proposal

IETF SECRETARIAT SERVICES

The Internet Society

On behalf of

The IETF Administrative Oversight Committee

Date of Issuance: June 15, 2007

Proposal Submission Deadline: July 30, 2007, 5:00 P.M. ET

IETF Secretariat Request for Proposal

Table of Contents

	Page
Section I General Procedural Information	3
Section II Specifications	6
Section III Proposal Format	11
Section IV Selection	13
Section V Other Terms and Conditions	15
Section VI Signature Page	16
Appendices	
Appendix 1 Offeror's Affidavit	17
Appendix 2 Statement of Work	18
Appendix 3 Workload and Service Level Description	33

Section I General Procedural Information

- A. Summary
- B. Procurement Office
- C. Questions & Inquiries
- D. Addenda to RFP and Corrigenda
- E. Conference Calls, Oral Presentations & Site Visits
- F. RFP Review Panel
- G. Escalation
- H. Process Modification
- I. Projected Schedule of Events

A. Summary

The IETF Administrative Oversight Committee (IAOC), on behalf of the IETF, announces this Request for Proposal for IETF Secretariat Services. The Internet Society (ISOC) is the contractor.

The Secretariat performs the following three types of services in support of the IETF – including its Working Groups, and the Internet Engineering Steering Group (IESG), Internet Architecture Board (IAB), IETF Administrative Oversight Committee (IAOC), Internet Research Task Force (IRTF), Internet Research Steering Group (IRSG), and Nominating Committee (NomCom), collectively the Supported Organizations:

1. Meeting Services
2. Clerical Support Services
3. IT Support Services

The services are further described in the Statement of Work at Appendix 2.

The initial contract term will be for two (2) years, commencing on January 1, 2008, with an option on the part of the parties for a renewal of up to two (2) additional years.

The closing date for submission of proposals is Monday, July 30, 2007 not later than 5:00 P.M. ET.

B. Procurement Office

Proposals are to be emailed to ietf-rfp@isoc.org, with a copy to rpelletier@isoc.org.

C. Questions & Inquiries

1. The sole point of contact regarding this RFP is the IETF Administrative Director (IAD), Ray Pelletier. Members of the IETF Administrative Oversight Committee (IAOC) and ISOC leadership are not responsible for responding to or forwarding inquiries of any kind.

2. All questions/inquiries must be submitted in writing and must be received no later than midnight, ET, July 1, 2007.

3. Questions/inquiries shall be directed by email to ietf-rfp@isoc.org, with a copy to rpelletier@isoc.org.

4. Responses to questions and inquiries shall be posted on the IETF Administrative Support Activity (IASA) website, iaoc.ietf.org, no later than July 3, 2007.

D. Addenda to RFP and Corrigenda

1. If the IAOC finds it necessary to revise any part of this RFP or correct any errors, an addendum will be provided in the same manner as the original RFP.

2. Addenda will be posted to the IASA website.

3. Addenda to the RFP will not be issued after July 10, 2007.

4. The proposal shall reflect acknowledgement of receipt of all amendments, addenda and changes, if issued, with the proposal.

E. Conference Calls, Oral Presentations & Site Visits

1. Conference calls may be conducted with Offerors.

2. Oral presentations may be required. If requested, the oral presentations may be conducted at the ISOC offices in Reston, Virginia or at a location designated by the IAD. Offerors will be responsible for their own expenses associated with such presentations.

3. The IAOC and others may conduct a visit(s) to Offerors' site prior to award. Visit(s) will be at the IAOC's expense.

F. RFP Review Panel

1. The IAOC may establish an RFP review panel.

G. Escalation

1. An Offeror may submit a request in writing to the IAOC via the IAD at rpelletier@isoc.org for a review and re-evaluation within seven (7) days of being notified of its rejection or disqualification. Such written request shall include the basis for the escalation.

2. The IAOC shall respond in writing within seven (7) days.

3. The IAOC may accept or reject the escalation in whole or in part. All decisions of the IAOC are final.

H. Process Modification

1. In the case where timely responses to the RFP fail to meet the basic requirements, the IAOC reserves the right to modify this RFP process.

2. The IAOC may choose to re-open the RFP or to enter into further negotiations with one or more of the Offerors in order to achieve the highest level of service possible within financial constraints.

I. Projected Schedule of Events

The IAOC intends to process this RFP in accordance with the following schedule:

IETF Secretariat RFP Projected Schedule of Events	
Date	Action
June 15, 2007	RFP Issued
July 1	Questions and Inquiries deadline
July 3	Answers to questions deadline
July 10	Addenda & Corrigenda deadline
July 30	Proposals due
August - September	Proposal Evaluation Period
September - October	Negotiation of contract(s)
October	MoU(s), if necessary
November	Contract Award(s)
November - December	Vendor transition
January 1, 2008	Contract(s) commence

Section II Specifications

This section provides details about the proposal submission, contract terms and contractor requirements.

- A. Term of Contract(s)
- B. Closing Date & Submittal Requirements
- C. Duration of Proposal Offer
- D. IAOC Discretion; Cancellation, Negotiation, Contracting, Rejection, Clarification
- E. Public Information
- F. Subcontractors
- G. Incurred Expenses
- H. Type of Contract(s)
- I. General Contractual Conditions
- J. Offeror Affidavit
- K. Experience
- L. Key Personnel

A. Term of Contract(s)

1. The initial contract term will be for two (2) years, commencing on January 1, 2008, with an option on the part of the parties for a renewal of up to two (2) additional years.
2. It is the intent of the IAOC to obtain the best combination of performance and cost for the benefit of the IETF. Accordingly, contracts may be awarded for each of the Secretariat services to separate vendors, to one vendor, or a combination of vendors, with or without subcontractors.
3. The renewal of the contract(s) should not be presumed, as it will be based on each party's sole discretion, the needs of the IETF Community and performance under the contract.

B. Closing Date & Submittal Requirements

1. A signed "Original" of the proposal in PDF format with a scanned handwritten signature must reach the ietf-rfp@isoc.org email account by Monday, July 30, 2007 not later than 5:00 P.M. ET in order to be considered.
2. Proposals or unsolicited amendments to proposals arriving after the closing time and date will not be considered.

C. Duration of Proposal Offer

1. Proposals shall be valid and irrevocable for 180 days following the closing date for this RFP.
2. This period may be extended by written agreement between Offerors and the IAD.

D. IAOC Discretion; Cancellation, Negotiation, Contracting, Rejection, Clarification

1. The IAOC may cancel this RFP, in whole or in part, at any time.
2. The IAOC may appoint an RFP Review Panel.
3. The IAOC may contract with one or more Offerors to accomplish the services reflected in the Statement of Work.
4. The IAOC may disqualify proposals which it deems to be non-responsive.
5. The IAOC may reject an Offeror's proposal if the Offeror:
 - a. Fails to submit by the deadline,
 - b. Fails to submit the information required,
 - c. Fails to submit a proposal in accordance with the required format,
 - d. Fails to submit a costs quotation response,
 - e. Fails to respond to requests for clarification, to make an oral presentation, to participate in a site visit, if requested,
 - f. Fails to complete the Offeror Affidavit, or
 - g. For any other reason that the IAOC deems to be reasonable.
6. The IAOC may seek clarification of any element of an Offeror's proposal.
7. The IAOC may require Offerors to make oral presentations in person at the ISOC's offices in Reston, Virginia, USA, or at a location designated by the IAD. Each Offeror will be responsible for its own expenses associated with such presentations.
8. The IAOC may select one or more Offerors for contract negotiations on the basis of the strength, viability and financial terms of their proposals and presentations, their known track records for similar functions, and the credentials and experience presented in their proposals. The IAOC does not make any commitment regarding the outcome of these negotiations.
9. The IAOC will seek to enter into contract(s) with an Offeror or Offerors that IAOC deems, in its sole discretion, to represent the best value combination of performance and cost for the IETF community, not necessarily the low bidder.
10. Following the successful negotiation of the principal financial and performance terms with an Offeror, ISOC may enter into a Memorandum of Understanding with such Offeror prior to negotiating and executing a definitive service contract. A contract shall not be deemed to be awarded hereunder unless and until the execution of a definitive contract with the Offeror.
11. All proposals shall become the property of the IASA.

E. Public Information

The IETF is a community committed to transparency in the manner in which it conducts its operations. Accordingly, the following will apply to the contract, proposal, and negotiations:

1. The contract, including total cost and Budget Summary, will be made public after discussion with Offeror.
2. The names of all Offerors will be announced on July 31, 2007.
3. Offeror proposals will NOT be released.
4. Negotiations are confidential among the Offeror, and IAD, IAOC, ISOC leadership, and any review panel.

F. Subcontractors

1. The Internet Society will enter into agreements with selected Offeror(s) only, not the Offeror's subcontractors.
2. The selected Offeror(s) shall be responsible for all products and services required by their respective contracts, even if they are permitted to use subcontractors to provide some or all of the services.
3. Subcontractors, if any, shall be identified with a complete description of qualifications and roles relative to this proposal, and shall be included at the time of proposal submission.
4. Subcontractors may not be placed under contract in any way that obligates ISOC, or that delegates work that the proposal indicates will be performed by Offeror personnel without the written approval of the IAD.

G. Incurred Expenses

1. The Offeror shall be responsible for its costs incurred in the preparation and submission of a proposal, oral presentations in support of such proposal, and negotiation of a Memorandum of Understanding, if any, and a definitive services agreement.

H. Nature of Contract(s)

1. The Secretariat performs many services. IAOC is willing to entertain bids for one, two, or all three of the set of Secretariat services.
2. Those proposing to bid discrete services must explain how they propose to integrate those services with other vendors and the IETF.

I. Type of Contract(s)

1. The contract(s) will cover the following services and pricing:

a. Meeting Services

- i. Fixed price for delivering service, and
- ii. Identify meeting costs for reimbursement.

b. Clerical Services

- i. Fixed price for delivering service.

c. IT Services

- i. Fixed price for delivering service, and
- ii. Costs for software development.

J. General Contractual Conditions

1. Each contract will contain the general provisions included in this RFP.
2. This RFP, including the Statement of Work, and the applicable portions of the successful Offeror(s)' proposal(s) will be incorporated by reference and made a part of the contract.
3. The contract will be negotiated based on ISOC's standard services contract form.

K. Offeror Affidavit

1. Each proposal shall include a completed Offeror Affidavit, a copy of which is included in Appendix 1.

L. Experience

1. Offeror must have experience in the functional area for which it is bidding, and such technical expertise as appropriate to the proposal.

M Key Personnel

1. Offeror shall identify and provide the resumes of Key Personnel.
2. Key Personnel shall include the proposed Senior Manager for each functional area if applicable to the nature of the bid.
3. The contract may be adjusted or terminated if Key Personnel are identified but cannot be supplied by Offeror at contract execution or within sixty days thereafter, at the discretion of IAOC.

N. Vendor Obligations

1. Offeror shall provide for and pay the compensation of its personnel, including Subcontractors, and shall pay all taxes, contributions and benefits (such as, but not limited to, workers' compensation benefits) which an employer is required to pay relating to the employment of employees.
2. The ISOC and IAOC will not be responsible for providing any compensation, insurance, medical, disability or other benefits to Offeror's personnel or subcontractors.

Section III Proposal Format

- A. Proposals
- B. Preparation
- C. Costs
- D. Proposal Format

A. Proposals

1. Proposals shall be submitted in the specified proposal format described in Part D below to facilitate proposal review.
2. Failure to submit the proposal in the specified format may be grounds for proposal rejection.
3. The Offeror will define its proposed methodology for meeting the requirements set forth in the RFP and why the approach is the preferred approach.

B. Preparation

1. Proposals should be prepared simply and economically, providing a concise and straightforward, but a complete and detailed, description of the Offeror's abilities and methodologies to meet the requirements set forth in the RFP.

C. Costs

1. Offeror shall identify all direct costs in the proposed budget.
2. Offeror shall state whether it is bidding for one, two, or all three services.
3. Meeting Services Quote
 - a. Fixed price for delivering service
 - b. Identify meeting costs for reimbursement
4. Clerical Services Quote
 - a. Fixed price for delivering service
5. IT Services Quote
 - a. Fixed price for delivering service
 - b. Costs for software development
6. All Services Quote
 - a. Fixed price for delivering services
 - b. Identify meeting costs for reimbursement
 - c. Costs for software development

D. Proposal Format

1. Transmittal letter with signature of authorized representative
2. Executive Summary
3. Table of Contents
4. Experience, Qualifications and Accomplishments in this area
5. Key Personnel and resumes
6. Commitment to meet functional requirement and service levels
7. Methodologies for meeting functional requirements and service levels
8. Describe improvements you would recommend to improve the value of the ietf.org website to the Supported Organizations.
9. Implementation and transition plan to assume responsibilities by January 1, 2008, including barriers and risks to Offeror achieving success.
10. References (Three references, where possible, attesting to performance in a similar function.)
11. Cost Quotation (See C above)
12. Subcontractor Information
13. Assumptions
14. Exceptions to any specifications, terms, conditions, service levels
15. Offeror Affidavit
16. Annual Reports of Business
17. Miscellaneous Information
18. Signature Page

Section IV Selection

- A. Selection Procedure
- B. Selection Criteria
- C. Negotiation Stage
- D. Award

A. Selection Procedure

1. The IAOC will or will cause the review and evaluation of all proposals to determine if they are qualified.
2. The IAOC will contact references.
3. The IAOC will conduct interviews and may require oral presentations.
4. The IAOC may perform a site visit to the Offeror's facilities at the IAOC's expense and/or interview key personnel.
5. Requests for clarity may be made of the Offeror.
6. Offerors will be notified by August 10, 2007 if their proposal has been disqualified or rejected, the reasons for the disqualification and their rights to appeal within seven (7) days in writing.
7. Qualified Offerors will be notified of their selection for advancement to the negotiation phase by September 30, 2007.

B. Selection Criteria as Judged by the IAOC

The IAOC must have confidence in the Vendor - its qualifications, experience, capabilities, personnel, timely performance, and professionalism. To that end the IAOC will evaluate the following to inform its decision:

1. Vendor Qualifications and Experience performing similar services
2. Key Personnel qualifications
3. Vendor Ability to Meet Requirements
4. Proposal as a reflection of Offeror's understanding of the Supported Organizations, their processes, culture, and the scope of work and methodologies
5. Oral presentation, if conducted.

6. Site visit, if conducted.

7. Cost to furnish the services. (Note: The lowest cost offer will not necessarily be awarded a contract.)

C. Negotiation Phase

1. ISOC may enter into contract(s) with an Offeror or Offerors that represents the best value combination of performance and cost to the IETF, not necessarily the low bidder.

2. The IAD will submit questions to each Offeror seeking clarification of any element of their proposal, if needed.

3. Negotiations will be undertaken in accordance with the timetable in Section I.

4. Negotiations may include face-to-face sessions in Reston, VA. Offerors are responsible for their own expenses associated therewith.

5. The IAOC reserves the right to solicit a best and final offer from each remaining Offeror.

D. Award

1. The Contract(s) is/are expected to be concluded by November 2007 however, if it appears that date will not be met, the essential terms of an agreement may be concluded in an MoU by October 2007.

2. The Contract is not awarded until a definitive contract is executed by the parties.

3. The Contract term begins January 1, 2008.

Section V

Other Terms and Conditions

A. Intellectual Property Rights

1. All work performed, and all software and other materials developed by the Vendor under the contract, shall be “works for hire” and shall be owned exclusively by ISOC and/or the IETF Trust, and the Vendor shall obtain or retain no rights therefrom.

B. Marketing and Promotion

1. The Vendor will not be entitled to use the IETF or ISOC trademarks or logos, whether or not registered, without prior written authorization.

C. External & Media Relationships

1. The Vendor is not responsible for, nor will engage in, public relations, relationships with the media, or other third party standards organizations on behalf of the IETF without prior written authorization.

2. The Vendor will not speak for the IETF without prior written authorization.

Section VI
Signature Page

Date Proposal Submitted: _____

Offeror: _____

Name/Title of Offeror Representative:

Address of Offeror:

Telephone: _____ Facsimile: _____

Offeror Representative Email Address:

Signature of Offeror Representative:

Date: _____

Appendix 1

Offeror's Affidavit

I HEREBY DECLARE AND AFFIRM that I am the (Title) _____,
and the duly authorized representative of (Offeror) _____,
and that I possess the legal authority to make this Affidavit on behalf of myself and the Offeror
for which I am acting.

I FURTHER AFFIRM THAT:

1. The Offeror named above is a {Insert type of entity} _____ in the
country and state of _____ and that it is in good standing and that has
filed all required statutory reports and, except as validly contested, has paid or arranged for the
payment of all taxes in the applicable jurisdictions.
2. The Offeror has been in business for _____ years and _____ months.
3. The Offeror's corporate registration number or equivalent:
_____.

**I do solemnly declare and affirm under the penalties of perjury that the contents of this
affidavit are true and correct to the best of my knowledge, information, and belief.**

_____ **By:** _____
(Date) (Affiant)

Appendix 2

Statement of Work

The Secretariat services include:

- A. Meeting Services
- B. Clerical Support Services
- C. IT Support Services

1. OBLIGATIONS

1.1 Vendor Obligations. The timely and professional delivery of services is essential to the effectiveness and efficiency of the IETF.

(a) Work. Vendor will perform the services ("Work") as set forth in the SOW.

(b) Personnel. Vendor shall assign and supervise employees and subcontractors with suitable qualifications to perform the Work. More specifically, Vendor shall provide a list of proposed qualified Key Personnel and include their resumes.

(c) Work Standards. Vendor shall perform the Work in a professional and workmanlike manner and in accordance with the prevailing industry standard for the performance of comparable Work. Contractor may define further work standards ("Work Standards"). Failure to perform services in accordance with standards may result in a reduction in fees or, possibly, termination.

1.2 Subcontractors. Vendor may engage the services of third party contractors, subcontractors, or consultants ("Subcontractors") in the performance of its obligations. Vendor shall be fully responsible for each such Subcontractor's compliance with the applicable terms of the Agreement, and Vendor shall be liable, without limitation, for all actions and omissions of such Subcontractors and their performance or failure to perform as required hereunder. Vendor shall identify proposed Subcontractors and provide information substantiating their qualifications for the services proposed.

1.3 Benefits. Vendor shall provide for and pay the compensation of its personnel, including Subcontractors, and shall pay all taxes, contributions and benefits (such as, but not limited to, workers' compensation benefits) which an employer is required to pay relating to the employment of employees. The Contractor will not be responsible for providing any compensation, insurance, medical, disability or other benefits to Vendor personnel. Vendor shall indemnify, defend, and hold the Contractor harmless from and against all such taxes, contributions, and benefits, and will comply with all associated governmental regulations, including the filing of all necessary reports and returns with respect to its personnel.

2. Financial Management

2.1 Professional Service. The Vendor will provide (i) professional financial management in accordance with applicable laws and regulations, (ii) budgets and year-end forecasts in a timely fashion, and (iii) invoices with appropriate supporting documentation.

(a) Meeting Financial Management.

- i. Vendor shall provide a proposed budget before venue contract execution,
- ii. Vendor shall provide the budget as adopted following venue contract execution, and
- iii. Vendor shall provide a financial report of each Meeting to the IAD. The preliminary meeting financial report shall be provided within 30 days of the meeting, with a final report due upon the Master Account reconciliation, but not later than ninety (90) days after the meeting.
- iv. The Master Account reconciliation will be pursued in a diligent and expeditious manner.
- v. Vendor will provide a statement of meeting and social registrations fee payments weekly.
- vi. Vendor will provide a report of its actual versus budget performance for each meeting.
- vii. All budgets shall be subject to IAD approval.
- viii. Year-End Forecasts shall be updated monthly.

(b) Clerical Financial Management

- i. Any expenses that are to be reimbursed require prior approval by the IAD, and Vendor shall provide invoices within 30 days of incurring the cost.

(c) IT Financial Management

- i. Vendor shall provide invoices within 30 days of incurring the cost.
- ii. Each software development project requires an approved schedule and budget before work begins.
- iii. Vendor shall provide monthly status report and financial report of each software development effort to the IAD. The reports shall include actual versus projected performance for each software development effort.

iv. All schedules and budgets shall be subject to IAD approval.

A. Meeting Services

The IETF conducts three, one-week meetings each year, usually in March, July and November, in locations throughout the world. Over a two year cycle the IETF intends to hold six meetings, three in North America, two in Europe and one in Asia. Attendance is in the range of 1,200 to 1,500 engineers, computer scientists, and academics per meeting. These meetings are in furtherance of the IETF's mission of standards development for the Internet. [See http://www.ietf.org/proceedings_directory.html.]

Meeting venues include hotels with conference space (the preference), as well as standalone conference centers within close proximity of hotels. Meeting space requirements are typically 40,000 square feet, comprised of 12 meeting rooms holding between 100 – 500 people; one Plenary room holding 1,000 people; a 140 seat terminal room; 5 offices; and a registration area. The public meetings generally run from 9:00 AM to 8:00 PM, Monday through Thursday, and the last session on Friday typically ends by 2:00 PM. On Sundays, registrations open at noon; multiple education sessions are scheduled during 1:00 to 5:00 PM, followed by a Welcome Reception. Registration takes place Sunday through Thursday. Throughout the week there are typically eight simultaneous meeting sessions at any given time. A Social event usually takes place on Tuesday evening at a separate facility and involves a fee to participate. The Plenary sessions are conducted on Wednesday and Thursday evenings from 5:00 PM to 7:30 PM with an attendance of about 1000 people. There are also other related meetings Staff support will be performed as necessary as to ensure smooth operation of all of these meetings.

The Vendor negotiates contracts with the meeting venue and one or more hotels for each meeting; sets agenda for the session throughout the week; runs the registration desk; oversees contract performance by the venues and hotels, including food and beverage and audio visual support; arranges for retreat venues; and other duties as more specifically set forth below.

1. IETF Meetings.

a. Location, Selection, and Sponsors.

- i. Based on the selection of meeting locations by the IAD Vendor shall identify the available meeting venues for three (3) meetings in a calendar year for the IETF Community (“Meetings”).
- ii. The location and venue selection shall be made by the IAD.
- iii. The Vendor will not be responsible for finding or negotiating with Meeting Hosts or Sponsors.

b. Meeting Calendar.

- i. The Vendor and IAD shall use commercially reasonable efforts to select Meeting venues no less than one (1) year in advance of such Meetings and to the

extent possible, two (2) or more years in advance.

ii. Meeting dates shall be fixed at least two (2) years in advance so as to avoid clashes with other major networking standards organizations or relevant events in accordance with the IAOC Clash Policy. The Vendor shall gather information with those other organizations as appropriate to avoid clashes.

c. Competitive Bids and Contracting.

i. Based on the selection of meeting locations and venues by the IAD, Vendor shall be responsible for qualifying and negotiating written bids from third party venue and hotel vendors for such Meeting venues and dates. Vendor shall use the IETF qualifications criteria to qualify venues and hotels.

ii. Vendor shall provide all contracts to the IAD for review and approval.

iii. All contracts with third party vendors relating to Meetings and Retreats, other than Host and Sponsor agreements, shall be executed by Vendor as an agent of ISOC, provided, however, that each such contract shall be approved by IAD and recognize Vendor as an agent of ISOC, or expressly permit Vendor to assign such contract in its entirety to ISOC.

iv. Vendor shall ensure that each contract into which it enters in connection with the performance of Work hereunder is reviewed and approved by legal counsel engaged or employed by Vendor; ISOC shall have no responsibility for any costs of such legal review.

d. Hotel Accommodations.

i. Vendor shall reserve an appropriate number of hotel rooms in as many hotels as necessary based upon the anticipated attendance for such Meetings as provided by the IAD.

ii. Vendor shall provide hotel reservation coordination services for IAB members, IESG members, IAOC members, and ISOC officers.

e. Commissions.

i. Commissions have impacts on attendance, costs and meeting fees. Vendor shall obtain the consent of and any guidance from the IAD prior to negotiating contracts with commissions.

f. Meeting Accommodations.

i. Vendor shall make arrangements for meeting accommodations.

ii. Vendor shall coordinate with Area Directors, Working Group Chairs, Birds of a Feather (BOF) session chairs, and Research Group Chairs to provide a schedule for meeting sessions that is best able to meet their requirements.

iii. Within the Meeting venues, Vendor shall arrange for an appropriate number of conference rooms to accommodate anticipated Working Group sessions and other breakout meetings which includes at least the following:

1. At least one room, or a combination of meeting rooms, which can accommodate a majority of the anticipated Meeting attendees for the IETF Plenary sessions;

2. Office and storage space for the Vendor staff, IAOC, and other volunteers of the IETF Community to handle the administration and management of the Meetings;

3. Meeting rooms for the IAB, IESG, IAOC, ISOC Board and staff, the IETF NomCom (when needed), the IETFs various committees – including the IRTF – for breakfast meetings and such other meetings as required;

4. Conference rooms that can be used for training sessions as determined in consultation with the Edu Team and IAD;

5. A network access room (commonly referred to as the “Terminal Room”) to accommodate at least 10% of expected attendees where participants can sit and obtain wired and wireless access, electrical power, and printing facilities;

6. An accommodation of wireless network access in all meeting rooms and appropriate public areas, such as meeting lounge areas;

7. A network operations center (commonly referred to as the “NOC”) and Help Desk of appropriate size and location to handle the network operations and customer support during the Meetings;

8. Audio visual equipment in each of the Meeting rooms to accommodate presentations from laptop computers via wired or wireless connections and microphones for the chairs, speakers, and at least two microphones for session attendees; and

9. Electrical services and power supplies in each of the conference rooms, except the Plenary facilities, at the Meeting venue, adequate for a majority of participants to obtain electrical power.

iv. Vendor shall provide a mailing list for IETF meeting attendees to communicate issues/problems directly to the NOC team, during the meeting.

v. Catering for morning and afternoon breaks, and possibly light breakfast and/or lunch.

vi. Arrangements for and coordination of the “Welcoming Reception”.

vii. Provide for promotion of the Social on the meeting web page.

g. Registration Services.

i. Vendor shall arrange for advance and onsite registration services for each Meeting. Such registration services shall be conducted both online, at least three (3) months in advance of such meetings, as well as real-time onsite registrations during the actual Meetings.

ii. Moreover, such registration services shall include the collection of all Meeting fees on behalf of the IETF Community, with a variety of payment methods including all major credit cards. Fees shall be deposited in an IASA-ISOC account.

iii. Vendor shall provide Letters of Invitation within three (3) business day to participants who register and need them in order to obtain visas or other travel documents. Prepayment of registration fee shall not be required for the issuance of a letter of invitation when the participant has attended one meeting in the previous three years.

iv. Vendor shall provide online registration services for the Social for deposit into the IASA-ISOC account when event registration opens or as soon thereafter as the Social details are fixed.

h. Pre-Meeting Preparation.

i. Vendor shall coordinate with the venues, local sponsors and meeting hosts (if any), and with other vendors, as well as IETF Community volunteers to deploy the network services.

ii. Vendor shall call for session agendas from Working Group chairs and BOF session chairs, and the Vendor shall provide a means for posting session agendas and presentations prior to the meetings.

iii. Vendor shall work with Area Directors, the IETF Chair, the IAB Chair, and the IRTF Chair to plan and approve the meeting schedule, including plenary sessions and any additional sessions that they approve. Information for the schedule will be gathered by the Vendor from Working Group and Research Group Chairs.

- iv. Vendor shall provide name badges and printed agendas for attendees.
- v. Vendor shall provide additional services, such as printing, stuffing registration tickets or accepting cash or check payment for the Social on site.
- vi. Vendor shall prepare a detailed timeline of various deadlines leading up to each meeting, such as start of registration, dates for submission of agenda requests, Internet-Draft submission deadlines, etc., which shall be published at least 4 months in advance and shall be strictly adhered to.

i. Sessions.

- i. Vendor shall arrange for the logging of attendance at Working Group and BOF sessions ("blue sheets") and for the posting of minutes and presentations to on-line Proceedings.

j. Security.

- i. Vendor shall make arrangements, at the expense of the Meeting Host, for onsite security for the Terminal Room during hours of operation, and the NOC during off-hours, and otherwise as may be requested by the IAD.
- ii. Vendor shall develop a security threat analysis and emergency plan prior to each meeting and provide to the IAD at least two weeks before the Meeting.

k. Community Meeting Feedback.

- i. Vendor shall work with the IAD to formulate surveys regarding the overall satisfaction of the IETF community with the Meetings, including the performance of Vendor in the delivery of its services.
- ii. Survey results shall be one criterion used to evaluate Vendor performance.

2. Retreats

a. Requirements

- i. The IESG, IAB, and IAOC each take one to two retreats annually.
- ii. The Vendor shall, upon request by the IAD, negotiate contracts for meeting space, hotel accommodations, food and beverage, Internet access, and audio visual support as needed.
- iii. Vendor shall provide hotel reservation coordination services for attendees.
- iv. IAD will approve the venue prior to execution of contracts.

B. Clerical Support Services

The Vendor provides direct support for the technical standards process. This support extends to the Supported Organizations. Much of the support is aided by tools (see tools list below).

The Vendor prepares, moderates, and follows up on actions for the twice monthly IESG two and one-half hour teleconferences at which the Area Directors review protocol actions, document actions, working group actions, and management issues. In addition the Vendor handles last calls; interim approvals; the creation, re-chartering and closure of working groups; the posting of implementation reports, appeals and responses to appeals and IESG statements; the posting of Internet-Drafts, IPR Disclosures and Liaison Statements; the maintenance of the IESG web pages; the maintenance of the IESG mailing lists; the support of the Nominating Committee; the provision of information on IESG procedures and processes.

The Vendor is responsible for receiving Internet-Drafts, reviewing them for conformance with established requirements, posting them to the Internet-Drafts repository, notifying interested parties, and announcing them to the community. The Vendor is also responsible for maintaining the Internet-Drafts repository and ensuring that the repository is kept up-to-date.

Internet-Drafts are submitted by participants in IETF working groups and by individual submitters at any time. Internet-Drafts are normally processed within one business day of their submission.

The Vendor is responsible for publishing official IETF actions to the IETF community. Most of the official actions that the Vendor publishes on a routine basis are actions taken by the IESG. These include Protocol Actions, Document Actions, Working Group Actions, Decisions on Appeals to the IESG, and IESG Statements. The IESG approves IETF documents for publication by the RFC Editor.

A ticket system for tracking requests for information and assistance from the IETF community shall be maintained by the Vendor. Requests for assistance with document and working group management are normally submitted by authors, working group chairs, Area Directors, and the RFC Editor. Requests for assistance may also be submitted by other members of the community. Requests for assistance with document and working group management are to be processed within two business days.

Specific services provided to the IESG may be extended to other members of Supported Organizations as approved by them and requested by the IAD. It is not expected that such services would represent a significant fraction of the workload and would not be extended to one additional FTE without discussion with and approval of the IAD.

1. Clerk Functions. The Vendor shall be responsible for providing the following services:

a. Supported Organizations support services.

i The Vendor shall arrange for cost-effective Teleconference services as requested

by the IAD.

ii The Vendor shall provide administrative support for (i) IETF document tracking, (ii) mailing lists, including but not limited to the IETF general discussion and announcement mailing lists and Working Group mailing lists, (iii) charters – WG and RG, (iv) handling actions for working group formation and re-chartering (v) Working Group milestone tracking, (vi) IETF websites, (vii) current working documents, and the (viii) archives of mailing lists, (ix) expired Internet-Drafts (I-Ds), and (x) any other documents belonging to the IETF standards process. Tools maintenance is covered under IT Support Services.

b. Standards Process Support. The Vendor shall support the IETF standards and document process. This process includes the:

i Publication of I-Ds and support of the I-D repository,

ii Document tracking,

iii Ticket-system-based response (document and working group management),

iv Announcements of last calls,

v Data management, including I-D Tracker updates,

vi Handling the Intellectual Property Rights disclosures, including interaction with patent holders [RFC4879],

vii Publication of official actions, such as document approvals, and other IESG/IAB/IAOC/NomCom announcements,

viii Communication of status to relevant groups,

ix Registration and publication of liaison statements, and

x Collection and archiving of presentations, minutes and attendance lists from IETF meetings, including interim meetings of Working Groups.

c. Managing meetings. The Vendor shall perform the following services specifically for the IESG. Such service may be extended to the Supported Organizations upon request by the IAD.

i Scheduling of and facilitating regular, normally bi-weekly, teleconference meetings;

ii Coordinating with the members of the IESG to create meeting agendas,

iii Create minutes following IESG Teleconferences,

iv Collecting, maintaining and administering the IESG process documents, including, but not limited to, “narrative” meeting minutes, statements, IONs, and

v Creating, maintaining and administering the long-term archives of IESG meeting minutes.

d. Support of the Nominating Committee (NomCom). The Vendor shall provide support to the NomCom of the IETF for the purpose of ensuring a smooth nomination and selection process for the leadership of the IETF.

e. Archive Services. The Vendor shall use commercially reasonable efforts to collect and store historical IETF Community records for which the Vendor is given access. Commercially reasonable backup practices shall be employed to ensure the availability of the records. These records include,

i Archives from mailing lists, including IETF mailing lists not hosted by the Vendor, where Vendor is provided access authority or where provided to Vendor in a format able to be archived by Vendor, including Working Groups (WG),

ii Expired I-Ds,

iii Working Group and Research Group charters and each of their versions,

iv Administrative records,

v Web site snapshots,

vi Minutes,

vii Jabber logs,

viii Audio and video files,

ix Meeting attendance records (blue sheets),

x Meeting proceedings, and

xi Long-term archive service to provide the members of the IETF community the ability to submit data objects for archive, retrieve archived data objects and tag archived data objects as obsolete.

C. IT Support Services

Vendor will provide for network presence, website support, mailing list services, customer support services, instant messaging support, IP support, subdomain support, tools maintenance and development services (currently in Perl and Python). These IT services provide vital support to all of the Supported Organizations. The Vendor must deploy IETF protocols where possible, but must use open standards where no IETF alternative is available.

1. IETF Infrastructure Services. The Vendor shall provide the following technical services for the IETF Community:

a. Network Presence. The Vendor shall provide a reliable and resilient network presence for the website and the following technical services:

- (i) co-location,
- (ii) secure name service [RFC 4035 and references],
- (iii) routing,
- (iv) transit,
- (v) monitoring & security,
- (vi) provisioning core services such as rsync and FTP, and
- (vii) cooperation and coordination with mirror sites.

The Vendor is required to provide in its offer the network and infrastructure measurements and Service Level Agreements it is prepared to deliver and maintain.

b. Websites Support. The Vendor shall provide distributed Web service for the following URLs: <http://www.ietf.org/>, <http://www.iab.org/>, and <http://www.irtf.org/>, as well as related URLs, and select subdomains, such as iaoc.ietf.org, approved by the IAD. This includes:

- (i) providing at least two independent (2) sites capable of serving 2+ Mb/sec of data over Web and FTP (i.e., located on different subnets and/or with different service providers),
- (ii) allowing for updates by multiple authorized users,
- (iii) adequate storage area,
- (iv) the provision of monthly reports of website performance, including whether improvements were made to increase the capacity above the 2+ Mb/sec of data over Web and FTP,
- (v) develop content as directed by IAD,
- (vi) provide and maintain site-map style indexing (in addition to the search button),
- (vii) apply common look-and-feel for all pages (apart from user-supplied content), including providing templates and style sheets for page authors,
- (viii) update web pages on request and within specified time limits,
- (ix) provide feeds (ATOMPUB, RSS, etc.) as appropriate, and
- (x) provide continual incremental improvements, including regularly redesigning web page trees to respond to common usage patterns.

c. Mailing Lists Services. With respect to all authorized IETF mailing lists, including those administered by the Clerical Services Vendor, the Vendor shall provide the following services:

- (i) capacity of 50,000 messages/hour (recipient side),
- (ii) the ability to host 2000+ mailing lists,
- (iii) Web-based mailing list maintenance.
- (iv) commercially reasonable spam filtering measures, including, at a minimum, those spam filtering measures the Vendor takes to protect its own internal and external mailing lists,
- (iv) dual redundant systems except during scheduled maintenance,
- (v) collection and storage of plain text and HTML-ized archives for all IETF lists, including IETF mailing lists not hosted by the secretariat where Vendor has been provided access authority or that are provided to Vendor in a format for which Vendor is able to archive in accordance with Section 2(e) above, and
- (vi) spam moderation of the IETF list.

d. Customer Support Services. Vendor shall provide a trouble ticketing service that provides a ticket queue system with customizable queues. Messages sent to certain conventional addresses such as iesg-secretary@ietf.org and ietf-action@ietf.org shall automatically enter the ticket system.

e. Instant messaging service. Vendor shall maintain an instant messaging service that provides for chat sessions. In addition, such chats shall be logged and archived for future viewing. The jabber (XMPP) standard shall be used.

f. IP Support. Vendor shall provide world-class IP support – IPv4 and IPv6. All IT services should be accessible from IPv4 and IPv6, with no difference in performance, quality, delay, and support.

g. Subdomain Support. Vendor shall provide DNS delegation and DNS support for IETF subdomains, e.g., tools.ietf.org, operated within the community and approved by the IAD.

h. Backups

- i. Backups shall follow best commercial practices to provide a robust backup capability.

i. Distributed Information

- i. Official I-D Archives, and
- ii. RSS and ATOM feeds

j. Tools.

- i. Vendor shall, at no additional charge, maintain, correct and update the current suite of “tools” utilized in connection with IETF "secretariat" functions, a list of

which is below. Vendor's obligation to so update such tools shall be limited to any correction of any bugs or performance issues that arise during the term of the Agreement, as well as minor extensions and enhancements (i.e. fewer than 5 programmer hours for each minor extension or enhancement) requested by the IAD,

ii. All tools shall be open sourced and with a license as directed by IAD, and

iii. Vendor shall provide a Tools Development and Proposal Management Report bi-weekly.

iv. Future tools shall be separately contracted and may be put out for separate bid.

k. IETF Community Participation

i. The IETF has a Tools Team which participates in the tools development and maintenance process for community tools and their interfaces, for example, in specifications development, tools design and development, tools testing, and project management.

ii. Vendor will be expected to cooperate and coordinate activities in these areas with the Tools Team.

Tools List

Web Tools:

1. Announcement Tool
2. Blue Sheet Creator
3. Chairs Management Tool
4. Database Interface
5. Internal Data Tracker
6. Internal Proceedings Management Tool
7. IPR Tool
8. Liaison Management Tool
9. Location Tool
10. Mailing List Request Tool
11. Meeting Management Tool
12. Message Scheduler
13. Miscellaneous Information Management Tool
14. NOMCOM Management Tool
15. Non-Working Group Mailing List Submission Tool
16. Onsite Self Registration Tool
17. Registration Management Tool
18. Secretariat Staff Management Tool
19. Telechat Management Tool
20. Tracker
21. Tracker Public
22. Validator
23. WG chairs Account Management Tool
24. WG Chair's Meeting Materials Management Tool
25. Meeting Session Request Tool

Server Side Tools:

1. Analyzer
2. Dos special character remover
3. Dos To Unix Converter
4. Duplicates Fixing Tool
5. Last Call Expiration Management Tool
6. List for NOMCOM generator
7. Monthly Report Generator
8. Registration Interface
9. Scheduled Message Interface
10. Scheduled Reminders Interface
11. Submission Auto Responder
12. Tombstone Manager
13. Tracker Email Interface
14. Web content generators

15. WG Milestones Reminder
16. Non-WG Mailing List Reminder

Tools Development in Progress:

1. I-D Submission Tool

Future Tools:

1. Liaison Statement Management Tool Enhancements
2. Meeting Session Scheduling Assistant
3. Working Group Tracker
4. Extensions to the I-D Tracker: Front End and Back End
5. XML Meta-Information
6. Internet-Drafts Management Tool
7. BOF Session Request Tool
8. Document Visualization Tool
9. E-mail Address Update Tool

Appendix 3

Workload and Service Level Description

- A. Introduction
- B. References and Sources of Information
- C. Historical Workload and Patterns

A. Introduction

The Secretariat is responsible for three functional areas: Meetings, Clerical, and IT. Appendix 2 is a statement of work providing a detailed breakdown of those functions. The purposes of this section are to provide historical information, or sources of information, from which one might gain a greater understanding of the customer, the workload, and service level expectations.

B. References and Sources of Information

Although not a complete list, Offerors should be familiar with the following material.

1. References

- a. RFC 2026: The Internet Standards Process -- Revision 3
- b. RFC 2418: IETF Working Group Guidelines and Procedures
- c. RFC 3978 & 3979: IETF Rights in Contributions and Intellectual Property Rights in IETF Technology
- d. The Tao of IETF: A Novice's Guide to the Internet Engineering Task Force, www.ietf.org/tao.html
- e. ION: The IETF Process: an Informal Guide, www.ietf.org/IESG/content/ions/ion-procdocs.html
- f. Guidelines to Authors of Internet Drafts, www.ietf.org/ietf/1id-guidelines.html

2. Sources of Information

a. IETF

- 1. General: www.ietf.org
- 2. IESG: www.ietf.org/iesg.html, www3.tools.ietf.org/group/iesg/trac/
- 3. Working Groups: www3.tools.ietf.org/group/wgchairs/

b. Meetings

1. Meetings Calendar 2008 – 2013, www3.ietf.org/meetings/0mtg-sites.txt
2. Meetings 1986 – 2007, www3.ietf.org/meetings/past.meetings.html
3. Meeting Proceedings, www.ietf.org/proceedings_directory.html
4. IASA Budget, iaoc.ietf.org
5. Meeting Financial Statements, iaoc.ietf.org
6. Meeting Surveys, iaoc.ietf.org

c. Clerical

1. IESG Teleconference Minutes, datatracker.ietf.org/public/view_telechat_minute.cgi
2. IESG Teleconference Narrative Minutes, www.ietf.org/IESG/iesg-narrative.shtml

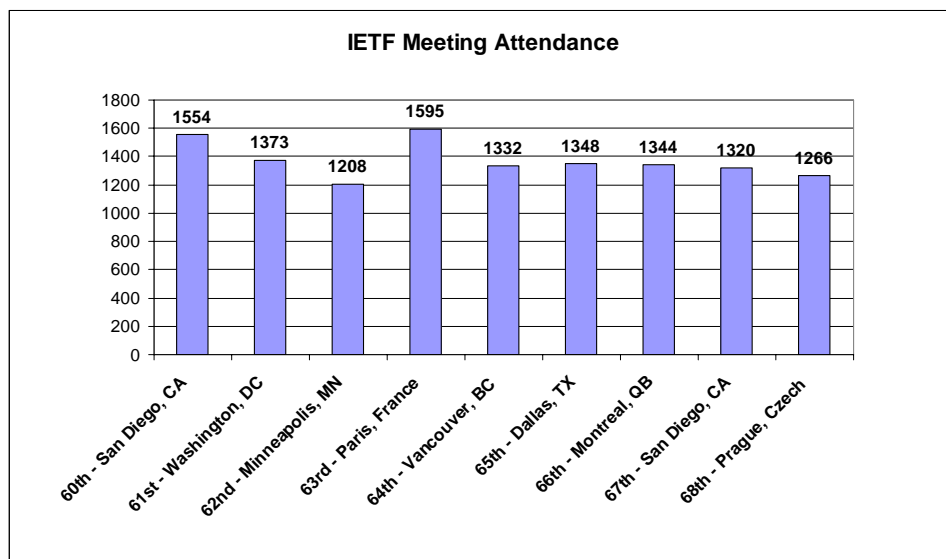
d. IT

1. IETF Systems Status, noc.ietf.org/
2. Web Stats, www.ietf.org/webstats/
3. IETF Web Tools, www.ietf.org/tools.html
4. IETF Volunteer Tools, tools.ietf.org

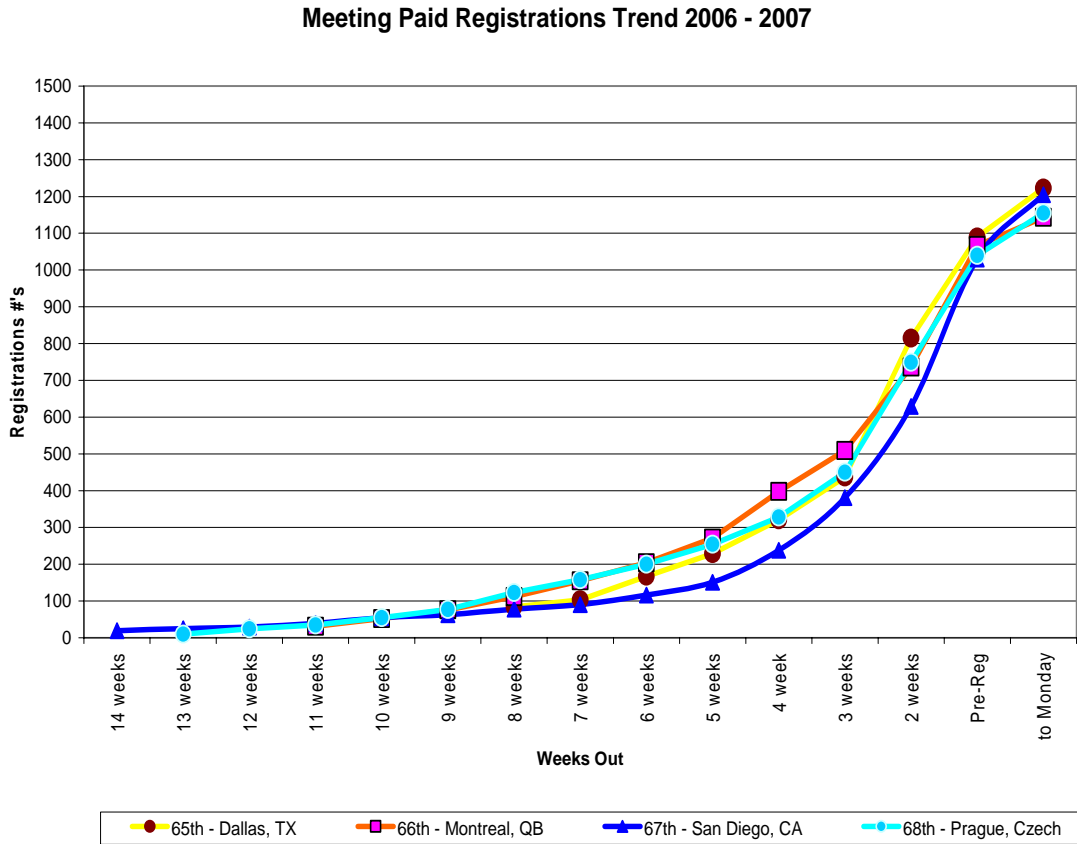
C. Historical Workload and Pattern

1. Meetings

The IETF conducts three meetings per year in locations around the world. The following chart reflects the attendance at these meeting since August 2004.



The following chart reflects the trend of registrations paid during the weeks prior to a meeting in 2006 and 2007.

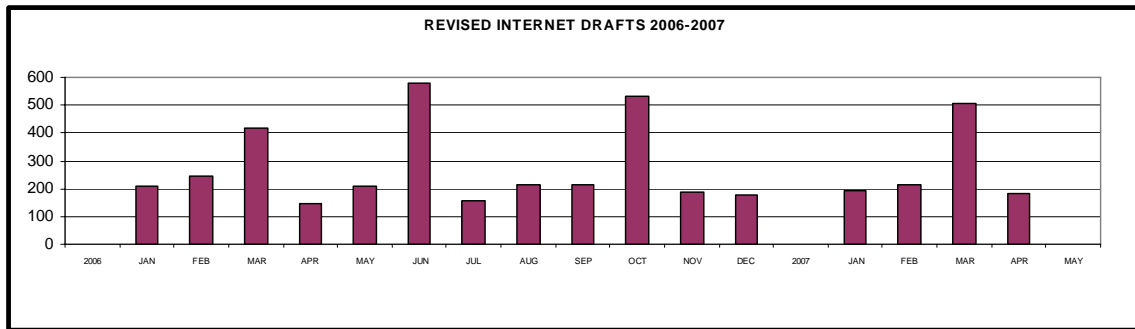
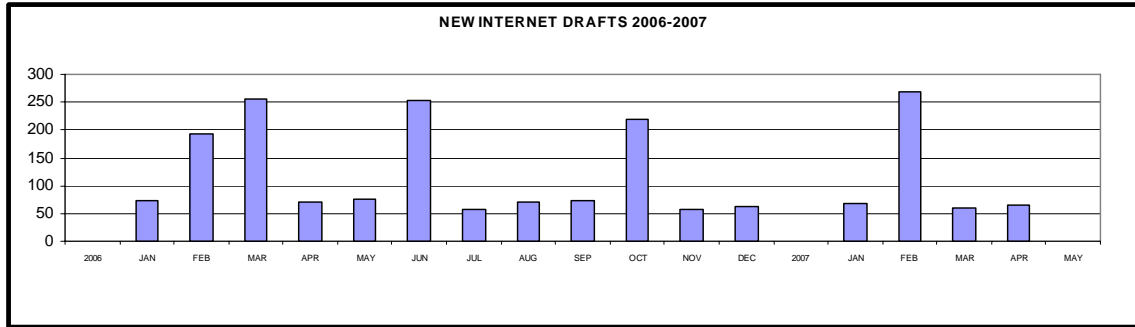


2. Clerical

The IETF Secretariat is responsible for receiving Internet-Drafts (I-D), reviewing them for conformance with established requirements, posting them to the I-D repository, notifying interested parties, and announcing them to the community. The Secretariat is also responsible for maintaining the I-D repository and ensuring that the repository is kept up-to-date.

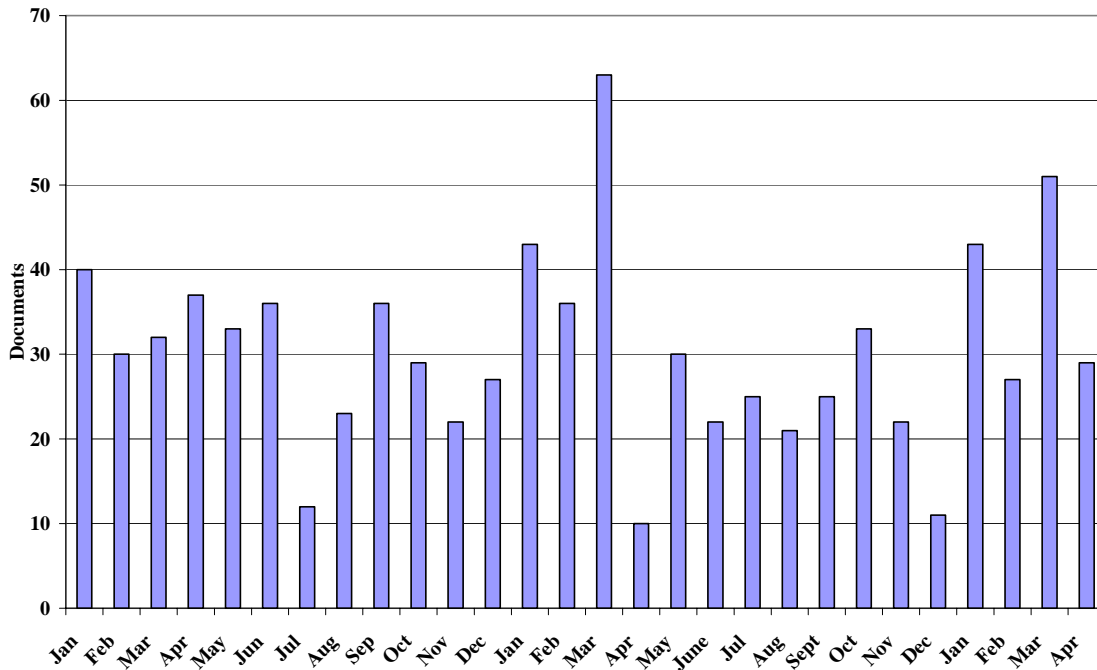
Internet-Drafts are submitted by participants in IETF working groups and by individual submitters at any time. I-Ds are normally processed within one business day of their submission.

The following charts reflect new and revised I-D posting volume for 2006 – 2007.

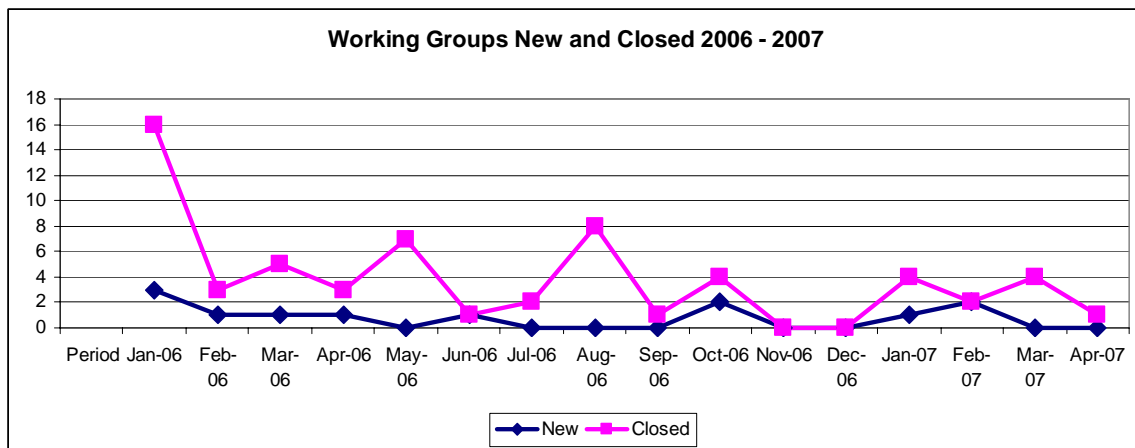


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Internet Drafts Submitted by IESG for Publication 2005 - 2007



The IESG creates and closes Working Groups. The following chart reflects new and closed Working Groups for 2006 – 2007. The Secretariat announces all Working Group creations and closures, and maintains Working Group information online throughout their life, see for example: <http://www.ietf.org/html.charters/atompub-charter.html>.



A ticket system for tracking requests for information and assistance from the IETF community is maintained by the Secretariat. Requests for assistance with document and working group management are normally submitted by authors, working group chairs, Area Directors (ADs), and the RFC Editor. Requests for assistance may also be submitted by other members of the community. Requests for assistance with document and working group management are normally processed within two business days.

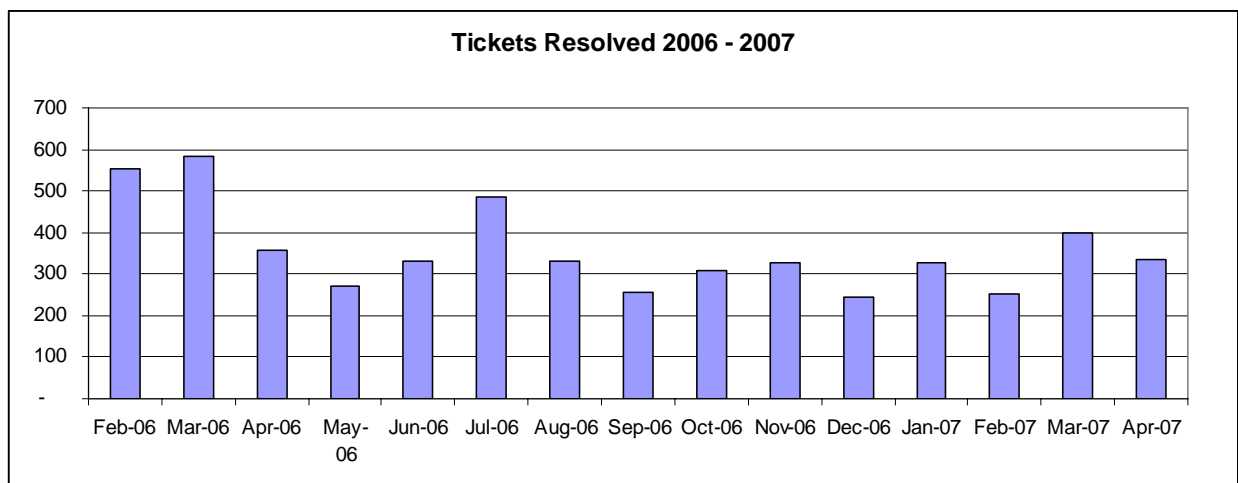
Document management requests may include:

- Publish an Internet-Draft (I-D) as an RFC
- Replace or withdraw an I-D
- Resurrect an I-D
- Issue a "Last Call"
- Send an approval announcement
- Request expedited handling by the RFC Editor
- Send a "No Problem" or "Do Not Publish" message to the RFC Editor
- Post an implementation report
- Forward an I-D to the IESG for Review
- Freeze expiration of an I-D
- Allow expiration of an I-D

Working Group management requests may include:

- Send a charter for "Internal Review"
- Send a "WG Review" announcement
- Send a "WG Action" announcement
- Add, replace, or remove a WG chair
- Update a WG milestone
- Add URLs to a WG charter
- Name a WG secretary or technical advisor
- Update contact information for a WG chair

The following chart reflects the volume of tickets resolved during February 2006 – April 2007.

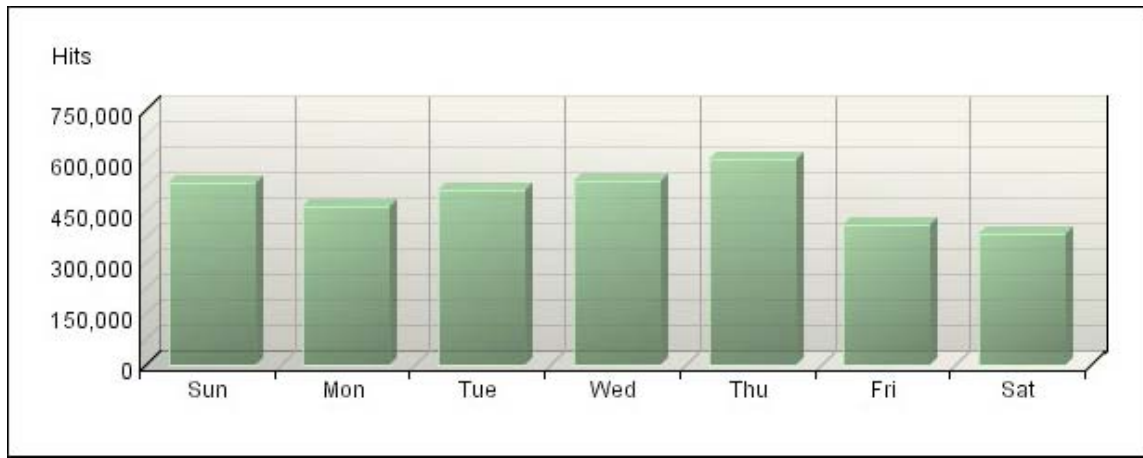


3 IT Services

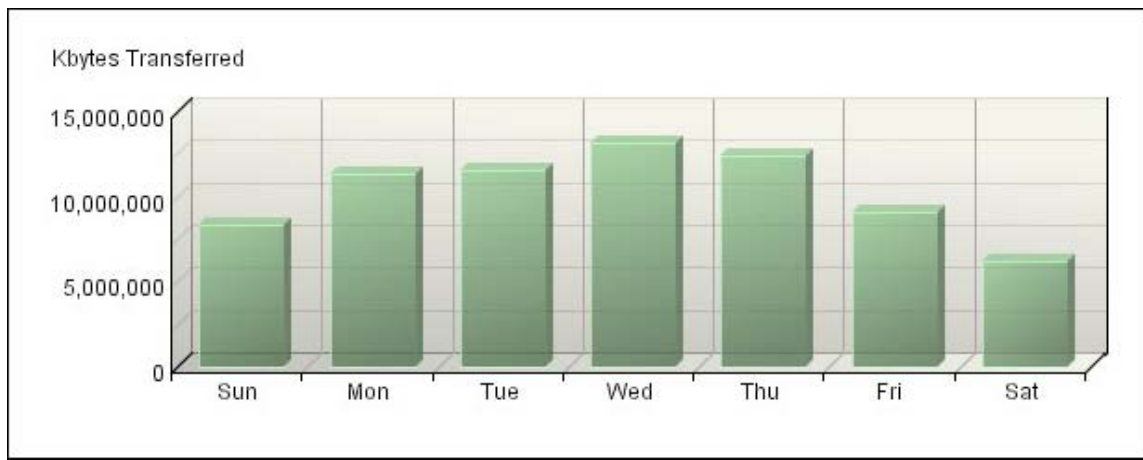
IETF system status information can be found at <http://noc.ietf.org/>.

These charts reflect Website activity during the week of April 15th 2007.

Hits

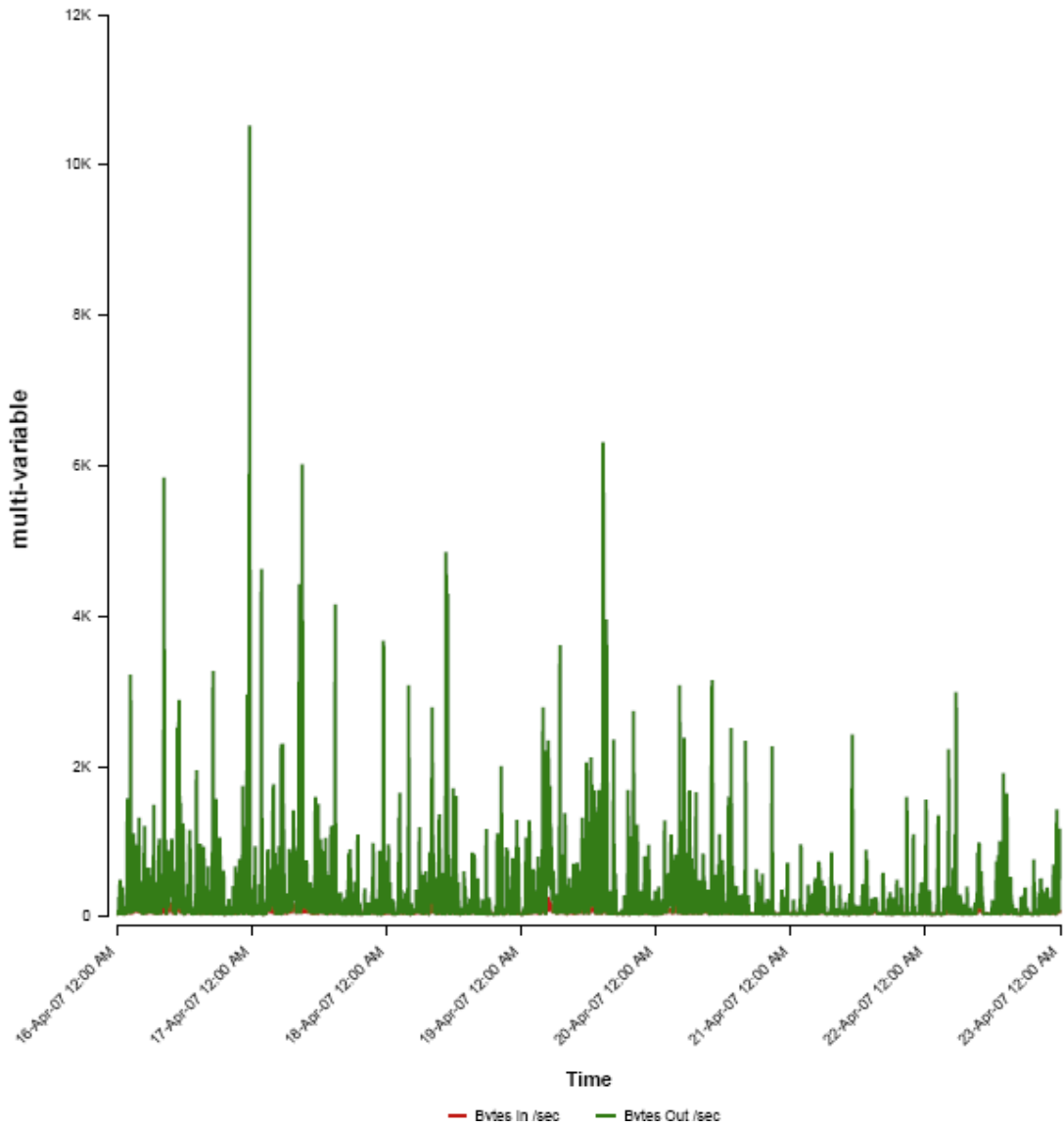


Bandwidth Kbytes Transferred



IPv4 Statistics

stiedprweb1.va-SH-enet-port-5
BW: 10.0 Mbps



IPv6 Statistics

stiedprweb1.va-SH-enet-port-3
BW: 10.0 Mbs

