



TOWN OF HILLSBOROUGH
California

Request for Proposals (RFP)

IT Managed Services

TOWN OF HILLSBOROUGH
1600 Floribunda
Hillsborough CA, 94010

DATE: July 29, 2020

Proposals Due: September 16, 2020 by 4:00 p.m. PDT

William Li

wli@hillsborough.net

RFP Project Manager

1. **RFP Overview**

1a. Introduction

- 1a1. The Town of Hillsborough (herein referred to as “TH” or the “Town”) needs to contract with an IT Managed Services provider to provide outsourced IT Managed Services per the requirements identified in this RFP.
- 1a2. The TH facilities include a main campus (Town Hall, Police Department, Finance) and Public Works Corporation yard.
- 1a3. TH has 91 full time employees

1b. Vendor Information

- 1b1. Vendor responses will be evaluated based on the details provided. Preferences will be afforded to the vendor that provides a comprehensive, cost-effective solution for current specifications, future capacity requirements, relevant experience, and ongoing service and support.

1b1a. **INTERPRETATION OR CORRECTION OF CONTRACT**

DOCUMENTS: The vendor shall, before submitting its proposal, carefully study and compare the components of the documents, and the conditions under which the work is to be performed.

- 1b1b. The vendor shall review the RFP documents, including but not limited to the Agreement, to determine if there are any particular requirements for this project which may impact the preparation of the proposal, including: Bid Security, Bonds, Insurance, Indemnity, and any other requirements.

- 1b1c. In the event the vendor has any questions regarding the meaning of any part of the documents, or finds any error, omission, inconsistency, or ambiguity in the documents, the vendor shall make a written Request for Clarification prior to submitting its proposal. Requests for clarification or interpretation of documents shall be addressed only to the project manager designated above. It shall be the vendor’s responsibility to ensure that any such request is submitted to TH in a timely manner no later than the date set forth in Section 1g in order to allow TH to issue a written addendum.

- 1b1d. If necessary, TH will make clarifications, interpretations, corrections, and changes to the documents by issuing an addendum as provided herein. Purported clarifications, interpretations, corrections, and changes to the documents made in any other manner shall not be binding on TH, and vendors shall not rely upon them.

- 1b1e. **REPLY FORMAT:** The vendor’s proposal and signed acknowledgment of terms and conditions, as well as all attachments, must be returned by the due date to the above email address. Vendors must submit one (1) copy of the proposal in electronic format (PDF or Word) via email to the project manager listed above. Vendors are required to clearly identify any limitations or exceptions to the requirements defined in this RFP, including but not limited to the Agreement. Alternative approaches will be given consideration if the approach clearly offers increased benefit to TH. TH is not responsible for non-receipt or mis-delivery, and it is the bidder's responsibility to ensure we have received their communication.

- 1b1f. **VENDOR QUALIFICATIONS:** The vendor has been in business doing this type of work for at least the last three years. Specifically, the vendor has done similar projects for other government agencies.
 - 1b1g. **RESPONSIVENESS AND SELECTION PROCESS:** The decision for selection will be made on a combination of criteria, including but not limited to: comprehensiveness of proposal, responsiveness and adherence to format, quality and completeness of proposal, qualifications and experience of the firm or partnership, with same or similar equipment/services, and vendor's ability to perform in a timely fashion; technical merits of specifications, system capabilities, reliability, and flexibility; system design and implementation; total cost (including ongoing operating costs); local project team and subcontractor/consultant qualifications; reputation of Vendor and products in similar installations; TH's perception of Vendor's stability within the industry.
 - 1b1h. **SUBCONTRACTORS:** TH prefers a proposal with a single or primary vendor. If a vendor partnership submits a proposal, a primary vendor who will be responsible for all hardware, software, integration, and implementation services shall be identified. This primary vendor will be responsible for the satisfactory performance of all subcontractors performing work under this contract.
 - 1b1i. **PAYMENT TERMS:** TH payment terms are net 30 days after receipt of all goods and/or services and receipt of an accurate invoice and associated warranties.
 - 1b1j. **FIRM PRICES:** All quotes shall be held firm for a minimum of 120 days after the proposal due date to allow adequate time for TH to consider each proposal and make an award. Upon receipt of its proposal by TH, the vendor shall be presumed to be thoroughly familiar with all aspects of this work. The failure or omission to examine any location, equipment, form, instrument, or document shall in no way relieve the vendor from any obligation with respect to this RFP and the agreement.
- 1c. General RFP Submittal Information
- 1c1. TH's designated staff will evaluate proposals received. TH reserves the right to retain all proposals submitted.
 - 1c2. **Public Records and Proprietary Information:** Proposers' attention is drawn to the fact that all proposal documents submitted are subject to California Government Code Section 6250 et seq., commonly known as the Public Records Act. Information contained in the proposals may be made public after the review process has been completed, negotiations have concluded, and a recommendation for award has been officially placed on the agenda for Town Council consideration, and/or following award of contract, if any, by the Town Council.
 - 1c2a. If a Proposer desires to exclude a portion of its proposal from disclosure under the California Public Records Act, the Proposer must mark it as such and state the specific provision in the California Public Records Act which provides the exemption as well as the factual basis for claiming the exemption. For example, if a Proposer submits trade secret information, the Proposer must plainly mark the information as

“Trade Secret” and refer to the appropriate section of the California Public Records Act which provides the exemption as well as the factual basis for claiming the exemption. Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, TH may not be in a position to establish that the information that a Proposer submits is a trade secret. If a request is made for information marked “Confidential”, “Trade Secret” or “Proprietary”, TH will provide Proposers who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction.

- 1c3. Submission of a proposal indicates the firm’s acceptance of the conditions contained in this RFP document, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between TH and the vendor selected.
- 1c4. The preparation of the RFP will be at the total expense of the proposer. There is no expressed or implied obligation for TH to reimburse responding proposers for any expense incurred in the preparation of proposals in response to this RFP. All proposals submitted to TH shall become properties of TH and will not be returned.
- 1c5. TH reserves the right to reject any or all proposals, in whole or part, and to waive any minor errors, discrepancies, or irregularities in any proposal. The selection will be at the discretion of TH and may be made in any manner that is in the best interest of TH.
- 1c6. The vendor may recommend other tasks that it deems appropriate to achieve the objectives set forth in this RFP.
- 1d. Vendor Walk Through
 - 1d1. Due to COVID-19, the Town can not allow a vendor walk through. The Town will provide to any vendor who submits an intent to propose the necessary information. Vendors will be asked to sign a non disclosure agreement (NDA) to not share the information with any other party.
 - 1d2. The Hillsborough Current Town Technology Environment Document includes network map (includes how connected, VLANS, locations, ect), data center locations, network closet inventory and pictures,
- 1e. Intent to Propose
 - 1e1. If a vendor intends to propose please send an email to project manager William Li at wli@hillsborough.net. Contact information should include Name, Title, Company, Address, e-mail and company website. All vendors who signify their intent to submit a proposal shall be notified via email of all questions, answers, addendums and other vendor communications.
 - 1e2. All vendors who notify the project manager of their intent to propose will be provided additional detailed information regarding the Town’s network that will not be posted on the Town’s website.
 - 1e3. All vendors who submit intent to propose and sign Town confidential agreement will be sent Town Current Technology Enviroment Document.
- 1f. RFP Questions

- 1f1. Questions with regard to this RFP should be submitted by email to William Li (wli@hillsborough.net), RFP Project Manager by August 19, 2020 by 4:00 p.m. PDT. Any firm who notified TH with Intent to Propose will receive a response to all questions and any other addenda that may be released via email on August 24, 2020.

1g. Schedule

Table 1 – Schedule

Schedule	Date
Release RFP	July 29, 2020
Deadline for Intent to Propose	August 12, 2020 4:00 p.m. PDT
Deadline for Questions	August 19, 2020 4:00 p.m. PDT
Response to Questions	August 24, 2020
Proposals Due	September 16, 2020 4:00 p.m. PDT
TH Review	September 2020
Vendor Award	October 2020

1h. General Provisions

- 1h1. Cancellation of RFP. TH reserves the right to cancel this RFP at any time prior to contract award without obligation in any manner for proposal preparation, interview, fee negotiation or other marketing costs associated with this RFP.
- 1h2. No Commitment to Award. Issuance of this RFP and receipt of proposals does not commit TH to award a contract. TH expressly reserves the right to postpone the RFP process for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one Proposer concurrently, or to cancel all or any part of this RFP.

2. Town Technology Environment

2a. Current Technology Environment

- 2a1. There are approximately 91 desktops, 29 laptops, 6 primary printer/copiers/scanners and 20 desktop printer/copiers/scanner. The public works field staff also utilize 25 tablets in the field. (Another vendor supports the Police Department field laptops)
- 2a2. Existing workstations are a combination of Windows 7, 8, and 10, the Town is in the progress of upgrading all workstations to Windows 10.
- 2a3. A project to upgrade all workstations to Office 365 is underway and will be completed before this contract is finalized. All electronic mail will be migrated to Office 365 in a newly created TH Office 365 Active Directory structure.
- 2a4. The Town’s website is hosted by CIVICPLUS.
- 2a5. TH computers are on a network. The winning proposer will be responsible for coordinating Internet, WAN, and VoIP problem resolution and upgrades with the vendor and TH.
- 2a6. Town has two main data centers. (See Town Technology Current Environment Document 1d)

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- 2a7. Town has two main locations. At each location multiple buildings are supported. An inventory of existing computers by location. (See Town Technology Current Environment Document 1d).
- 2b. Network Design and Configuration
 - 2b1. IP address segmentation, VLANs, DHCP, and other network services needs and management will be the responsibility of the winning proposer.
 - 2b2. Network switching is combination of HP, Adtran, Aruba, and Dell.
 - 2b3. Firewall is Palo Alto Networks (one firewall at two locations, no backup firewall)
 - 2b4. Internet Connection is provided by Comcast (ISP). Fiber line from PD server room to PW Location. Utility Connect is a T1 for backup at the PW location.
 - 2b5. Telephony is Avaya VoIP supported by 3rd Party (Vox). Only support would be networking and coordination, as needed, with VoIP vendor. Day to day is managed by inhouse staff.
 - 2b6. Cell Phones and mobile broadband services are not in scope except to assist with connectivity issues to email.
 - 2b7. Video Surveillance of Town facilities – Ask Adam? SSF is supporting now
- 2c. Wireless
 - 2c1. Each TH facility has Aruba system wireless, which the winning vendor will maintain. Assume that all cabling is sufficient. Expertise in Aruba is important.
 - 2c2. Cell phones and mobile broadband services are not in the scope of services for this RFP. Support of remote access to email on a cell phones and tablets is in scope.
- 2d. Third Party Software In Use by Town
 - 2d1. Microsoft Windows (Version 7,8,10), Microsoft Server(multiple OS version)
 - 2d2. Microsoft Office 365
 - 2d3. Work Order System (currently Lucity)
 - 2d4. Land Use, Planning, Permitting and Inspection Systems (currently TrackIT)
 - 2d5. ERP – Financial Management, CIS/Utility Billing (currently Tyler Fund Balance migrating to MUNIS SaaS Solution)
 - 2d6. Electronic Content Management System (currently SIRE)
 - 2d7. ESRI ArcGIS
 - 2d8. Automated Meter Reading System (currently Sensus)
 - 2d9. Adobe Acrobat
 - 2d10. Netmotion Server (PW Tablets to Lucity)
- 3. **Scope of Services**
 - 3a. The requested services are defined in Appendix A.
 - 3b. Proposer shall respond to the requirements in IT Managed Services – Scope and Services defined in Appendix A.

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- 3c. Appendix A lists the services in three sections:
 - 3c1. Base Services (must be provided by all providers);
 - 3c2. Desktop and Server Support Services;
 - 3c3. Network and Security Services.
- 3d. Proposers may propose additional services not listed in scope.

4. **Proposal Costs**

- 4a. Please provide proposed costs for services using the excel spreadsheet Appendix B.
 - 4a1. The spreadsheet is meant to provide proposers with sufficient information for pricing based on their particular service model.
 - 4a2. Quantities may not be exact, a final inventory and true-up will be required within the first three months of services.
- 4b. Provide proposed costs for personnel for an average of eight hours of on-site support per week, excluding organization holidays. Monthly costs to include IT management, reporting, and budgeting.
- 4c. Special projects and project-related work are not included in on-site support.
- 4d. Managed Services monthly costs are entered in excel spreadsheet. TH expects managed services to include Help Desk support and remote support. Note that the purchase and installation of managed services software will be the responsibility of the vendor.
- 4e. TH reserves the right to select final services from the the proposed services offered during a final contract process.
- 4f. Projects and project-related work are not included in on-site support services. Use the spreadsheet tab titled "Project Costs" to enter costs. TH lists possible projects, proposer should add other possible project work for consideration.
- 4g. Special projects that are outside of normal support and planned projects may be requested by the organization from time to time.
- 4h. Compensation/Payment Schedule
 - 4h1. Proposer is required to submit their cost proposal. Proposer must state if the proposed rate is guaranteed for the term of the contract or if it is subject to adjustments. If subject to adjustments, proposer must state the frequency of adjustments and how adjustments are determined. Travel expenses will not be paid by the organization as a part of this contract.
 - 4h2. Invoicing shall be monthly for services rendered. Detailed invoicing for all time and expense charges shall include:
 - 4h2a. Date of service
 - 4h2b. Who performed service
 - 4h2c. Description of service performed
 - 4h2d. Duration of chargeable time.
- 4i. Alternate Proposals

- 4i1. Any potential work not included within the proposed scope of services, or which has not been mentioned in this RFP, must be clearly identified, along with a suggested basis for payment, should those services be necessary or elected by the organization.

5. **Implementation**

5a. Project Management

- 5a1. Contractor is expected to provide an Account Manager for the Town. The Account Manager is expected to interface with the Town's technology liaison and management, and become the main contact for the Town for the duration of the project.
- 5a2. Project implementation will be coordinated with Town schedules in order to minimize any disruptions to normal operations.

5b. Transition Plan and Implementation Schedule

- 5b1. TH expects the new IT providers transition plan to have limited impact on ongoing operations. Vendor is expected to have experience in this area and to provide TH with a detailed plan to accomplish the transition from the current IT support provider to the new IT support provider, with minimized disruption to staff.
- 5b2. All documentation, installation, reports, and materials must be provided to TH prior to commencement of installation, followed by submission of any Moves, Adds, Changes (MAC).
- 5b3. Respondent will be expected to interface as needed with TH's telecommunication and Internet providers for any necessary changes during the transition.

6. **Submittal Instructions**

- 6a. Please submit an electronic copy via email of the proposal by 4:00 PM on September 16, 2020 signed by the firm's authorized agent to William Li with subject title "IT Managed Services". The proposal must be received before the specified time. Late proposals will not be considered. All questions, proposals, and comments must be submitted in writing via email only to:

William Li, RFP Project Manager
Email: wli@hillsborough.net

- 6b. Interested parties shall not directly contact any TH staff member or appointed officials. All responses to questions will be in writing via email and will be provided to all known potential responders.

- 6c. Submission Requirements – Proposals may be PDF or MS Word format. Cost proposal shall be in excel spreadsheet format.

6c1. Table of Contents

- 6c1a. Title Page: Should include the subject of the proposal, the proposing company's name and postal address, the name, email address, and telephone numbers of a contact person, the date of the proposals, and signature of a duly authorized official representing the vendor.

- 6c1a1. Proposals shall be signed and dated by an authorized officer with a guarantee that the proposal will be valid for a minimum of 120 days

- 6c1a2. A statement indicating whether or not the firm, in the event of award, would be able to provide insurance meeting or exceeding the requirements and acceptance of TH's standard consultant agreement.
- 6c1b. Executive Summary
 - 6c1b1. Company Background (number of years actively providing professional services for technology services, location of office from which service will be provided, company's normal business hours [PST] for office-providing services)
 - 6c1b2. Description of any claims, lawsuits, or legal settlements your firm has had in the past and/or those that are currently pending.
- 6c1c. Qualifications and References
 - 6c1c1. The firms' qualifications and experience performing similar projects
 - 6c1c2. A list of the proposed staff members who will be assigned to this project and their qualifications
 - 6c1c3. A list of a minimum of three references from at least one of which is a government agency for whom the firm has provided similar services in California
- 6c1d. Response to Appendix A Scope of Services
 - 6c1d1. Appendix A Section 1 Overview and Approach
 - 6c1d2. Appendix A Section 2 Base Services
 - 6c1d3. Appendix A Section 3 Desktop and Server Services
 - 6c1d4. Appendix A Section 4 Network and Security Services
 - 6c1d5. Implementation project plan with a timeline to describe how the proposer will transition services from current provider.
- 6c1e. Appendix B Cost Sheet
 - 6c1e1. A cost sheet showing any and all charges for performing the services in the proposed scope of work
 - 6c1e2. Support Services – Indicate the level and nature of support available
- 6c2. The proposal shall be signed by an individual, partner, officer, or officers authorized to execute legal documents on behalf of the vendor.
- 6d. Selection Process
 - 6d1. Proposals submitted in response to this RFP will be reviewed by a cross-functional team that is representative of TH staff. The evaluation will be based on vendor's response to the *Submission Requirements* section.
 - 6d2. It is TH's intent to select a vendor evidencing demonstrated competence and professional qualification sufficient to perform the services. The successful proposer will be selected on the basis of information provided in the proposal and the results of TH's research and investigation. Upon selection of a vendor, TH will endeavor to negotiate a mutually agreeable consultant

services agreement with the selected vendor. In the event that TH is unable to reach agreement, TH will proceed, at its sole discretion, to negotiate with the next vendor selected by TH. TH reserves the right to contract for services in the manner that most benefits the Town including awarding more than one contract if desired.

- 6d3. An unsatisfactory-rated proposal will not be considered further by TH. Reference checks may consist of phone and/or email inquiries to any current or past customer of the vendor, either provided by the vendor or contacted independently by TH. All vendors will be notified by email at the conclusion of the selection process.
- 6e. Insurance Requirements – Minimum Scope of Insurance
 - 6e1. Coverage shall be at least as broad as:
 - 6e1a. **Commercial General Liability (CGL):** Insurance Services Office (ISO) Form CG 00 01 12 07 covering CGL on an “occurrence” basis, including products-completed operations, personal & advertising injury, with limits no less than **\$2,000,000** per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location, or the general aggregate limit shall be twice the required occurrence limit.
 - 6e1b. **Automobile Liability:** ISO Form Number CA 00 01 covering any auto (Code 1), or if Consultant has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limit no less than **\$2,000,000** per accident for bodily injury and property damage.
 - 6e1c. **Workers’ Compensation:** As required by the State of California, with Statutory Limits, and Employer’s Liability Insurance with limit of no less than **\$1,000,000** per accident for bodily injury or disease.
 - 6e1d. **Professional Liability (Errors and Omissions):** Insurance appropriate to the Consultant’s profession, with limit no less than **\$1,000,000** per occurrence or claim, **\$2,000,000** aggregate
 - 6e1d1. If the contractor maintains higher limits than the minimums shown above, the department requires and shall be entitled to coverage for the higher limits maintained by the contractor.
 - 6f. Other Insurance Provisions
 - 6f1. The insurance policies are to contain, or be endorsed to contain, the following provisions:
 - 6f1a. Additional Insured Status
 - 6f1a1. **The Department and its elected and appointed officials, employees, and agents are to be covered as insureds** on the auto policy for liability arising out of automobiles owned, leased, hired, or borrowed by, or on behalf of the Contractor, and on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor’s insurance (at least as broad as ISO Form

CG 20 10, 11 85 or both CG 20 10 and CG 20 37 forms if later revisions used).

6f1b. Primary Coverage

6f1b1. For any claims related to this contract, the **Contractor's insurance coverage shall be primary** insurance as respects the Department, its elected and appointed officials, employees, and agents. Any insurance or self-insurance maintained by the Department, its elected and appointed officials, employees, or agents shall be excess of the Contractor's insurance and shall not contribute with it.

6f1c. Notice of Cancellation

6f1c1. Each insurance policy required above shall provide that **coverage shall not be canceled, except after thirty (30) days' prior written notice** (10 days for non-payment) has been given to the Department.

6f1d. Waiver of Subrogation

6f1d1. Contractor hereby grants to Department a waiver of any right to subrogation which any insurer of said Contractor may acquire against the Department by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the Department has received a waiver of subrogation endorsement from the insurer.

6f1e. Deductibles and Self-Insured Retentions

6f1e1. Any deductibles or self-insured retentions must be declared to and approved by the Department. The Department may require the Contractor to purchase coverage with a lower deductible or retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

6f1f. Acceptability of Insurers

6f1f1. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to the Department.

6f1g. Verification of Coverage

6f1g1. Contractor shall furnish the Department with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by the Department before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Contractor's obligation to provide them. The Department reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

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6f1h. Special Risks or Circumstances

6f1h1. Department reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

6f1i. Subcontractors

6f1i1. Contractor shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Contractor shall ensure that TH is an additional insured on insurance required from subcontractors.

6g. Agreement

6g1. Proposers should carefully review this RFP and all attachments, including but not limited to, the Town of Hillsborough Consulting Services Agreement (Attachment A). The selected vendor will be required to sign TH's agreement. Comments or objections to any terms of TH's agreement must be made in writing and received with the proposal submission. Vendor should note any objections, or if none, note that as well in the proposal submission.