



REQUEST FOR PROPOSAL

RFP 2019 - 1
January 9, 2019

IT Managed Services Provider

City of Duncan, Finance Department
Attention: Bernice Crossman, Director of Finance
City of Duncan, 200 Craig Street,
Duncan, BC, V9L 1W3

Submission Deadline: February 21, 2019, 2:00 p.m. (local time)

TABLE OF CONTENTS

- DEFINITIONS..... 4
- 1.0 - INTRODUCTION 4
 - 1.1 PURPOSE 4
 - 1.2 BACKGROUND 4
- 2.0 - INSTRUCTIONS TO PROPONENTS 4
 - 2.1 SUBMISSION OF PROPOSALS 4
 - 2.2 INQUIRIES..... 5
- 3.0 - GENERAL TERMS OF PROPOSAL PROCESS 5
 - 3.1 PROPOSAL PREPARATION COSTS 5
 - 3.2 PROPOSAL EVALUATION 5
 - 3.3 PROPOSAL PRESENTATION 6
 - 3.4 PROPOSAL CONFIDENTIALITY AND PROPRIETARY INFORMATION 6
 - 3.5 CONFLICT OF INTEREST 7
 - 3.6 NO COLLUSION 7
 - 3.7 LITIGATION 7
 - 3.8 NO CONTRACT 7
 - 3.9 ACCEPTANCE OF PROPOSAL..... 7
 - 3.10 PROPOSAL CONTENT..... 8
 - 3.10.1 Company Overview 8
 - 3.10.2 Project Team & Experience..... 8
 - 3.10.3 Project information 8
 - 3.10.3.1 Maintenance, Support and Monitoring Services 8
 - 3.10.3.2 Proponent Experience 8
 - 3.11 SUBCONTRACTORS 9
 - 3.12 PROPOSAL CONTENT & INNOVATION 9
 - 3.13 WORKERS COMPENSATION ACT..... 9
- 4.0 – CURRENT TECHNOLOGY CONFIGURATION 9
 - 4.1 LOCATIONS, STAFFING AND EQUIPMENT 9
 - 4.2 CURRENT TECHNOLOGY CONFIGURATION 10
 - 4.2.1 Workstation Details 10
 - 4.2.2 Network Connectivity 10
 - 4.2.3 Network Servers 10
 - 4.2.4 Other Managed IT Devices 10
 - 4.2.5 Applications and Essential IT Services 10
- 5.0 – SCOPE OF WORK 10
 - 5.1 NETWORK MONITORING AND OPTIMIZATION MANAGEMENT 10
 - 5.2 NETWORK DESIGN, INSTALLATION AND SUPPORT 11
 - 5.3 HELPDESK 11
 - 5.4 PC MANAGEMENT 12
 - 5.5 NETWORK SECURITY 12
 - 5.6 DISASTER RECOVERY AND REDUNDANCY MANAGEMENT 12
 - 5.7 IT ASSET LIFECYCLE MANAGEMENT..... 12
 - 5.8 SERVICE LEVEL REQUIREMENTS 12
 - 5.9 APPLICATION VENDOR LIAISON 12
 - 5.10 BACKUP AND SPARE EQUIPMENT 13
 - 5.11 DOCUMENTATION 13
 - 5.12 ISSUE MANAGEMENT/ALERT/NOTIFICATIONS 13
 - 5.13 REPORTING..... 13
 - 5.13.1 Daily..... 13

5.13.2 Monthly Reporting..... 13

5.13.3 Quarterly Meetings..... 14

5.14 CONTRACT TERM..... 14

REQUEST FOR PROPOSAL

RFP PROGRAM TITLE: IT Managed Services Provider

DEFINITIONS

“**CONTRACTOR or CONSULTANT**” means the Proponent whose Proposal has been accepted by the City of Duncan and is awarded a contract by the City of Duncan to carry out the Work.

“**CoD**” means the City of Duncan.

“**PROPONENT**” means the responder to this RFP.

“**PROPOSAL**” means a proposal to carry out the Work submitted by a Proponent in response to this RFP.

“**RFP**” means this Request for Proposal.

“**WORK**” means and includes anything and everything required to be done for fulfillment and completion of the project in accordance with this RFP and Proposal.

1.0 - INTRODUCTION

1.1 PURPOSE

The City of Duncan is seeking the services of an Information Technology Managed Services Provider (MSP) who will provide a full range of IT support services, including on-site and remote system maintenance, advanced desktop support and troubleshooting, proactive network management, software licensing management, equipment warranty management and assisting in IT asset tracking and resource planning.

1.2 BACKGROUND

The City of Duncan (CoD) provides local government services to approximately 5,000 people. CoD, as a municipal government, operates a wide variety of facilities and functions. There are computers at many locations including City Hall, Public Works and the Fire Hall. There are also other devices such as printers, photocopiers, receipt printers and mobile devices that may require attention.

2.0 - INSTRUCTIONS TO PROPONENTS

2.1 SUBMISSION OF PROPOSALS

The Proposal and their envelopes should be clearly marked with the name and address of the Proponent and the RFP program title. The sealed envelope should be addressed to the following:

Bernice Crossman, Director of Finance
City of Duncan
200 Craig Street
Duncan, BC V9L 1W3
Office No. 250-746-6126, Fax No. 250-746-6129
Email: bernice@duncan.ca

Proposals must be received on or before the **Closing Time** of:

TIME: 2:00 p.m. (local time)

DATE: February 21, 2019

Proposals (3 hard copies) will be accepted until the Closing Time specified. It is the Proponent's sole responsibility to ensure its Proposal is received at the address set out above by the Closing Time.

Proponents wishing to make changes to their Proposals after submission but prior to the Closing Time may do so by submitting the revisions by fax, email or hard copy. It is the Proponent's sole responsibility to ensure the revisions are received by the CoD prior to the Closing Time.

Proposals received after the Closing Time may not be accepted or considered.

2.2 INQUIRIES

Proponents shall carefully examine the RFP documents and shall fully inform themselves as to the intent, existing conditions and limitations which may affect their Proposal submission. No consideration will be given after submission of a Proposal to any claim that there was any misunderstanding with respect to the conditions imposed.

Proponents finding discrepancies or omissions in the Contract or RFP, or having doubts as to the meaning or intent of any provision, should immediately notify the above listed project contact. If there are any changes, additions, or deletions to the Proposal scope, conditions, or closing date, Proponents will be advised by means of an Addendum issued by CoD. All Addenda are to become part of the Proposal Documents and receipt of Addenda should be acknowledged by the Proponent in the submission.

3.0 - GENERAL TERMS OF PROPOSAL PROCESS

3.1 PROPOSAL PREPARATION COSTS

All expenses incurred by the Proponent in preparation and submission of this Proposal are to be borne by the Proponent, with the express understanding that no claims for reimbursements against CoD will be accepted. CoD shall not be responsible for any costs involved in or associated with any meetings, discussion or negotiation following submission that could lead to acceptance of the Proposal and award of a contract.

3.2 PROPOSAL EVALUATION

CoD recognizes that "Best Value" is the essential part of purchasing a product and/ or service and therefore CoD may prefer a Proposal with a higher price, if it offers greater value and better serves CoD's interests, as determined by CoD, over a Proposal with a lower price. Proposals will generally be evaluated based upon the following criteria:

Company and Project Team Qualifications

- Technical and management experience and skills of Proponent and other team members.
- Quality of Proponent work, based on recent and relevant project experience on similar assignments, demonstrating suitability to undertake work.
- Minimum 3 references relating to project experience, including contact name and project details; past performance appraisals if available.

Presentation of Services

- Demonstrated understanding of requirements, scope of work and deliverables.
- Clarity and completeness of submission.
- Addressing work effort and team member participation and role in delivering work.
- Identifying any potential options or changes to outlined requirements that could be advantageous to the City.

Fees

- Costing of each major part and key task to complete the project.
- Lowest proposal will not necessarily be accepted.

CoD, at its sole discretion, reserves the right to:

- Reject any or all Proposals whether complete or not;
- Reject any Proposal it considers not in its best interests;
- Waive any minor irregularity or insufficiency in the Proposal submitted;
- Not be liable for misunderstandings or errors in the Request for Proposals;
- Issue addenda to the Request for Proposals;
- Contact references provided by the Proponents;
- Retain independent persons or contractors for assistance in evaluating Proposals;
- Request points of clarification to assist CoD in evaluating Proposals;
- Negotiate changes with the successful Proponent; and
- Withdraw the Request for Proposal.

3.3 PROPOSAL PRESENTATION

CoD reserves the right to request one or more of the Proponents whose submissions are of particular interest to CoD, to make oral presentations to CoD.

3.4 PROPOSAL CONFIDENTIALITY AND PROPRIETARY INFORMATION

All submissions become the property of CoD and will not be returned to the Proponent. CoD will consider all Proposals submitted as confidential but reserves the right to make copies of all Proposals received for its internal review and for review by its financial, accounting, legal, and technical consultants.

Proponents should be aware that CoD is a “public body” as defined in and subject to the provisions of the *Freedom of Information and Protection of Privacy Act*.

If the Proponent believes any of the information requested in this RFP and provided by them is confidential, then they should identify it as such and provide a rationale as to why it should not be released under “Freedom of Information” legislation.

The rationale for keeping information confidential under this legislation includes:

- a) Trade secrets of the Proponent;
- b) Financial, commercial, scientific or technical information, the disclosure of which could reasonably be expected to result in material financial loss or gain or could reasonably be expected to prejudice the competitive position of the Proponent; or
- c) Information the disclosure of which could be reasonably expected to interfere with contractual or other negotiations of the Proponent.

3.5 CONFLICT OF INTEREST

A Proponent shall disclose in its Proposal any actual or potential conflicts of interest and existing business relationships it may have with CoD, its elected or appointed officials or employees, any property ownership direct or indirect in the jurisdiction. CoD may rely on such disclosure.

3.6 NO COLLUSION

Except as otherwise specified or as arising by reason of the provision of the contract documents, no person whether natural, or body corporate, other than the Proponent has or will have any interest or share in this Proposal or in the proposed contract which may be completed in respect thereof. There is no collusion or arrangement between the Proponent and any other actual or prospective Proponents in connection with Proposals submitted for this project and the Proponent has no knowledge of the contents of other Proposals and has made no comparison of figures or agreement or arrangement, express or implied, with any other party in connection with the making of the Proposal.

3.7 LITIGATION

Proponents who, either directly or indirectly through another corporation or entity, have been or are in litigation, or who have served notice with intent to proceed with court action against CoD in connection with any contract for works or services, may be considered ineligible Proponents. Receipt of Proposals from such Proponents may be disqualified from the evaluation process.

3.8 NO CONTRACT

This RFP is not a tender and does not commit CoD in any way to select a preferred Proponent. By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contractual, tort or other legal obligation of any kind is formed under or imposed on CoD by this RFP or submissions prior to the completed execution of a formal written Contract.

3.9 ACCEPTANCE OF PROPOSAL

The acceptance of a Proposal will be made in writing from CoD and will be addressed to the successful Proponent at the address given in the submitted Proposal. Following acceptance and approval to proceed with the Proposal, the Proponent is expected to

enter into a contract with CoD to perform the works or services set out and agreed upon in the Proposal.

3.10 PROPOSAL CONTENT

Proponents should structure their proposals to provide, at a minimum, the necessary information as outlined in this RFP and the following information:

3.10.1 Company Overview

The proposal shall provide a general overview of the company, its structure, size and capability to perform the work required. This section should specifically highlight recent and relevant experience that demonstrates the company's suitability to undertake the scope of work. A minimum of three references relating to relevant project experience shall be provided, including contact names and details.

3.10.2 Project Team & Experience

The proposal shall clearly identify the proposed team members that will perform the work, and indicate the level of involvement of each team member in the proposed work. This section should address team structure and organization and also demonstrate how the team members identified have the requisite experience to perform the work. Resumes of all team members should be included in an Appendix to the proposal.

3.10.3 Project information

3.10.3.1 Maintenance, Support and Monitoring Services

- Detailed description of maintenance, support, and monitoring services for a 12 month term, including standard business hours and after hours support models.
- Detailed cost of maintenance, support and monitoring services, including itemized monitoring fees. This should be able to be summarized into a monthly estimated service cost.
- Defined levels of support (e.g. Level 1 issues, Level 2 issues).
- Detail response times for both action and resolution of issues at each level. If you have service guarantees, please also document the guaranteed times.
- Describe the system you use to triage and track issues for your clients.
- Travel rates if required.
- If you operate from more than one location, please detail any shared services and how they are delivered.

3.10.3.2 Proponent Experience

- Describe what you would need from the client in terms of resources and support in order to undertake the scope of the work in this RFP.
- Describe your prior experience in providing comparable services for other municipal organizations or similar institutions.
- Outline the key attributes that distinguish your organization from the competition.
- Describe your approach to establishing and managing client relationships.
- Explain your ability to respond to changing client needs.

- Outline key accomplishments and/or industry awards.
- Describe how you maintain records and documentation of client's IT systems.
- Provide a sample of a standard monthly report to provide to existing clients.
- Provide the names and contact information of a minimum of three client references for services similar to those outlined in this RFP. At least one of the three references must be from a prior client with whom you no longer have a relationship.

3.11 SUBCONTRACTORS

The Proposal shall include the company name of all sub-contractors and sub-consultants proposed to be used in the performance of the Work with a description of the work they would be performing.

The sub-contractors and sub-consultants listed in the Proposal may not be changed without the written consent of CoD. If CoD so requires, the Proponent shall be prepared to confirm to CoD the competence of sub-contractors and sub-consultants prior to acceptance of the Proposal.

3.12 PROPOSAL CONTENT & INNOVATION

The Proponent shall address in the Proposal submission, all the information as requested in the RFP documentation. The Proponent is also encouraged to include innovative, alternative or unique solutions to the Proposal subject that may, along with other things, indicate cost initiatives, improved environmental impacts, better public relations and/ or project acceptance, reduced risk, improved management or administrative efficiencies, etc. Any alternative Proposals submitted should include all the requirements of the original RFP with costs identified for comparative purposes.

3.13 WORKERS COMPENSATION ACT

The Proponent, and any proposed sub-contractors and sub-consultants, should provide a Work Safe BC (Workers Compensation Board) Registration Number in the Proposal and shall at the time of signing a contract agreement, provide proof of payment of claims in good standing with Work Safe BC.

4.0 – CURRENT TECHNOLOGY CONFIGURATION

4.1 LOCATIONS, STAFFING AND EQUIPMENT

CoD has approximately 26 pc based workstations and 4 laptops at three locations; City Hall, Public Works, Duncan Volunteer Fire Department. CoD also provides equipment (iPads and tablets) to staff and supports 7 elected officials for CoD related business.

Most staff use standard-issued IT equipment (Microsoft Windows PC/Laptop, Monitors, tablets and possibly a smartphone). Most staff, as well as Council and Officers in the Volunteer Fire Department receive an email account on the Exchange server.

The CoD does not have a dedicated IT department.

4.2 CURRENT TECHNOLOGY CONFIGURATION

4.2.1 Workstation Details

- Laptops – four of various configurations
- Desktops – a variety of desktops are used, the majority are HP ProDesk and HP Compaq Elite

4.2.2 Network Connectivity

All internet service is provided by Access Data Group and/or Shaw. Locations are joined through a Managed Layer 2 Connection.

4.2.3 Network Servers

Three servers are in use and one is scheduled for replacement in 2019.

4.2.4 Other Managed IT Devices

There are other devices including network printers (Konica Minolta and Ricoh) and various local printers. There are also fax machines at each office, 17 iPads, 2 android tablets and 18 Apple and Android Smartphone devices.

4.2.5 Applications and Essential IT Services

- Microsoft Windows 7
- Server 2008 and 2012R2
- A variety of Office versions are currently in use
- CoD is scheduled to migrate all users to Office 365 in 2019
- Vadim iCity financial software

5.0 – SCOPE OF WORK

COD is seeking the services of an Information Technology Managed Services Provider (MSP) who will provide a full range of IT support services, including on-site and remote system maintenance, advanced desktop support and troubleshooting, proactive network management, software licensing management, equipment warranty management and assisting in IT asset tracking and resource planning.

COD may rely heavily on the Proponent, from time to time, to provide input into planning, establishing, implementing and maintaining the network infrastructure, applications and hardware.

In your RFP response, please outline your experience and proposed delivery model with regard to the delivery of the services listed below. The primary deliverable for the RFP is a support contract that will provide the following, but not be limited to:

5.1 NETWORK MONITORING AND OPTIMIZATION MANAGEMENT

- Monitor and report on the availability, performance, security and health of the hardware and software components of the network.

- Utilizing 24-hour / 7 days per week electronic alerts to monitor the systems, any detected issues must be resolved in a proactive manner to avoid or minimize network downtime.
- Optimize network traffic flow for the City's business needs.
- Management and removal of log files and temp files on servers.
- Server system updates, firmware updates, patching, and version control.
- Daily data back-up (and testing/verification of those backups).
- Ensuring that critical applications used at CoD are operating within normal parameters.

5.2 NETWORK DESIGN, INSTALLATION AND SUPPORT

Proponents should indicate their ability to manage the following if and as required:

- Manage local and remote servers, LANs, routers, switches, firewalls and other physical network devices.
- Implementation and maintenance of a documented network map.
- Working with the Director of Finance as needed for execution of IT equipment upgrade plan, including purchasing and installation.
- Remote and onsite technical support.
- Documented support process maps for staff orientation and efficient processing.
- Print driver installation and management.
- VPN subnet management, set-up and client support.
- Liaise with other software and hardware vendors to ensure interoperability between key systems. The Proponent must ensure physical requirements of the network are optimized for application performance.

5.3 HELPDESK

The Proponent shall operate a helpdesk during regular business hours (8:00 am – 4:00 pm PST) which will provide CoD with IT support.

The Proponent will also provide a cost schedule for after-hours service, to provide technical support in exceptional circumstances.

The Proponent must identify with clarity how helpdesk style support will be managed / conducted which should address the following potential issues:

- Telephone/email support
- Coverage will include, but is not limited to:
 - All incoming calls and email automatically redirected to Proponent's helpdesk.
 - Ticket management/documented tiered escalation process.
 - Hardware and software troubleshooting.
 - Connectivity issues at the desktop level.
 - Software installation.
 - User account creation/management.
 - Network folder permissions.
 - New PC/laptop setup and installation.
 - Mailbox administration.
 - Cell phone setup assistance.
 - Update documentation as required.
 - Computer moves, upgrades and other requests.

5.4 PC MANAGEMENT

- Provide advice, plan and assist with major desktop OS rollouts.
- Provide input and assistance into software licensing.

5.5 NETWORK SECURITY

- Manage firewall policies including scheduled and ad hoc firmware updates.
- Install and manage anti-virus and anti-spyware software.
- Manage spam filtering, user authentication, and file security software/hardware.
- Manage and maintain VPN connectivity.
- Assist CoD in developing, reviewing and updating IT security policies on a scheduled and ad hoc basis.
- Implement open source or commercial IDS tools.
- Undertake security compliance audits annually and as requested by CoD.
- Maintenance of all network passwords.

5.6 DISASTER RECOVERY AND REDUNDANCY MANAGEMENT

- Regular and scheduled maintenance and testing of UPS devices, including monitoring battery life via remote access card.
- Ensure continuity of internet connectivity.
- Provide off-site data backup services.
- Manage server backups and necessary hardware for disaster recovery.
- Document and update disaster recovery and redundancy processes.
- Regular backup image testing to ensure integrity of the backup process.

5.7 IT ASSET LIFECYCLE MANAGEMENT

- Track hardware and software model, version, serial numbers, licensing model, end-user use, end-of-life, warranty, maintenance costs etc.
- Assist and provide advice to CoD during annual hardware/software renewal planning.

5.8 SERVICE LEVEL REQUIREMENTS

The Proponent will monitor the CoD servers, network, infrastructure and other key services on a 24 hour / 7 day per week basis and will notify the City immediately of arising issues. Proponents must specify response times for:

- Emergency service (e.g. Complete service interruption) on-site response.
- Non-emergency (e.g. service degradation, information request or minor service degradation).

5.9 APPLICATION VENDOR LIAISON

The Proponent may be asked to act on behalf of CoD for vendor liaison of software applications, anti-virus, anti-spyware and other general desktop or server applications.

For certain applications specific to CoD's business operation, CoD will be the primary liaison. That being said, the Proponent is expected to work with CoD staff and the

providers of these business applications to ensure physical requirements of the network are optimized for application performance.

5.10 BACKUP AND SPARE EQUIPMENT

It is expected that the Proponent stock critical spare network, server and desktop equipment that can be used, as a temporary measure, in the event of a major component failure while waiting for replacement components. Examples include managed switches, hard disks, servers, laptops, NAS devices, wireless APs, etc.

5.11 DOCUMENTATION

Proponent will maintain inventory of all IT assets, document change and updates and provide it to CoD senior staff at least annually. The Proponent should track the assets' purchase/installation dates, serial numbers, warranty expiry, firmware versions, installed applications, IP information, configurations, passwords, key contacts, etc. Such information will be made available to CoD senior staff on request and at contract end.

5.12 ISSUE MANAGEMENT/ALERT/NOTIFICATIONS

The Proponent will maintain a system that provides management with real time alerts and notification of critical and non-critical issues that are encountered.

5.13 REPORTING

5.13.1 Daily

CoD staff will require access to the Proponent's ticketing system to track all tickets, whether they are resolved internally or by the proponent.

5.13.2 Monthly Reporting

- CoD requires reporting on all open and closed ticketed items, whether through remote access to ticket management system or reports accessible via the web or emailed directly to senior staff.
- Activities performed related to CoD's IT network during the month, including actual time spent by resource and charge out rate by resource if applicable.
- Amount of travel time billed (if any) to CoD.
- Number and description of service calls taken and average response times to respond to and resolve call requests/issues.
- Detailed accounting of issues requiring escalation, including name of reporter, description, action taken and timeline for resolution.
- Breakdown by location of staff reporting the issue.
- Statistics and commentary detailing the health and performance of the network (e.g. available disk space, network speed, CPU utilization, slow switches, etc.)
- List of upcoming work required/recommended (e.g. expiring licenses, new drivers to be installed, etc.)

5.13.3 Quarterly Meetings

Network health review, outstanding issues, capacity and strategic IT planning sessions that may include data backup, firewall changes, storage array configuration, desktop management, application deployments and server and network hardware. These meetings ideally will take place in-person but could be made by conference call.

5.14 CONTRACT TERM

CoD will contract with the selected provider for 3 years with option for renewal for a second 2 year term upon satisfactory performance against established deliverables.