



RICHMOND REGIONAL PLANNING DISTRICT COMMISSION

9211 FOREST HILL AVENUE, SUITE 200
RICHMOND, VIRGINIA 23235
(804) 323-2033

Request for Proposals
RRPDC RFP #19-1
Outsourced IT & Managed Services

Submission Deadline:

Friday, September 14, 2018

Anticipated RFP Schedule:

Request for Proposal issued:	Monday, August 13, 2018
DEADLINE to submit questions:	Friday, August 24, 2018 before 10:00 a.m.
DEADLINE for proposals to be delivered by:	Friday, September 14, 2018 before 4:30
Finalists interviewed (if necessary):	September
Contract negotiations:	October
Date of award:	November

Invitation:

The Richmond Regional Planning District Commission (RRPDC) invites all qualified offerors to submit a proposal for the comprehensive IT solution to manage and support our technology infrastructure. This solicitation is released with the expectation of identifying a contractor to execute the services described herein and others that may arise in the future.

Solicitation of this RFP is not binding. RRPDC reserves the right to postpone or cancel this project based on review of the quality of and costs identified by the proposals received.

Submissions and Questions:

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Proposals will be received by the RRPDC by both postal and electronic mail. (Proposals will not be accepted in facsimile form.) All information received in response to this request that is marked Proprietary will be handled accordingly. Responses to the Request will not be returned. Full submission requirements and instructions are detailed in Section 8 herein.

Questions concerning this Request for Proposal should be directed to
RRPDC – MANAGED SERVICES IT - RFP COORDINATOR:
REX HOCKEMEYER
TARGET CONSULTING, LLC
804-929-1074
REX.HOCKEMEYER@GMAIL.COM

All questions from prospective offerors and answers regarding this proposal will be posted on the RRPDC's website at www.richmondregional.org where prospective offerors will also find links to background information about the RRPDC.

By: Martha Shickle
Martha Shickle
Executive Director

Date: 8/13/18

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1 Request for Proposal (RFP)

The Richmond Regional Planning District Commission (RRPDC) invites you to respond to this Request for Proposal (RFP). The focus of the RFP is to select a single organization to provide IT managed services to RRPDC over a three (3) year period, beginning on January 1, 2019 and ending no later than December 31, 2022. Following the initial term, there is a possibility to renew this contract for multiple one (1) year terms.

2 Introduction to Richmond Regional Planning District Commission (RRPDC)

The RRPDC is an intergovernmental agency that facilitates collaboration among the nine local jurisdictions in the Richmond region. The RRPDC provides planning assistance, regional transportation planning and programming, and demographic, economic, and geographic information services. Under contract, the RRPDC also provides staffing services for individual regional organizations.

The RRPDC's major objectives are to:

- identify issues and opportunities of an interjurisdictional nature;
- establish plans and policies for addressing those regional issues;
- identify ways and means for state and local governments and the private sector to implement programs;
- promote cooperation among state and local governments; and
- provide technical assistance and information services to its member jurisdictions.

The RRPDC board is comprised of elected officials and citizens who address mutual problems and develop solutions for the local governments which benefit from intergovernmental cooperation. Additional information including the RRPDC's Charter and Bylaws is available at www.richmondregional.org, or by contacting the organization directly at the address included in this solicitation.

The purpose of the COMMISSION shall be to promote the orderly and efficient development of the physical, social, and economic elements of the Planning District by planning, encouraging, and assisting governmental subdivisions to plan for the future.

The mission of the RRPDC is to strengthen the quality of life throughout the Richmond region by serving as a regional forum of member local governments to address issues of regional significance, providing technical assistance to localities, and promoting and enhancing the collective consensus on the economic, transportation, social, environmental, and demographic interests of the region.

3 Overview of Current RRPDC Technical Environment

- Martha Shickle is the Executive Director of the RRPDC, but the primary contacts for all operational and technical items are Katherine Busser and Rex Hockemeyer.
- There are 25 employees at the RRPDC, but there are small fluctuations that result from interns, grants and special projects.
- The environment is a combination of workstations and laptops running Windows 7 and Office 365. There are approximately 32 Hewlett Packard PCs and 5 Lenovo laptops and 5 HP laptops. The RRPDC tries to manage to a 5-year life cycle.
- RRPDC has four servers; one running MS Windows Server 2012, one running Windows Server 2008 and two running Windows Server 2003. One of the servers running WS 2003 will be decommissioned in 2019 when a website redesign project completes.
- The servers are located at 9211 Forest Hill Avenue, Suite 200, Richmond, VA 23235.

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- The network includes two Cisco Switches, one Fortinet Firewall and three Wireless Access Points.
- Data is backed up nightly.
- Managed Services and Technical Support is currently provided by Convergent Technologies Group.
- The Boardroom Audio/Visual equipment has an interface with the local network.
- The phone system is dated and the RRPDC is planning to replace the current system with a VoIP system in the next 12 months.
- The RRPDC runs multiple versions of ESRI's ARCGIS, a GIS mapping technology. A new design for this infrastructure is requested including potential development of a discrete environment. Support for data management and archiving is required. (see <http://www.arcgis.com/>).
- A new website is in development and may also require hosting and support services.
- The RRPDC currently uses a desktop version of Quick Books for financial accounting and needs this to be migrated to a cloud version (with all accompanying history files)
- The RRPDC does not currently have an intranet environment and is potentially interested in developing a new Share Point environment.

4 Value Added Service Requirements

As part of this RFP, the following services are the current priority items for RRPDC:

- **Remote backup** – Executing a nightly backup plan for the critical servers, including a regularly-tested recovery process.
- **Technology strategy planning** – Working with current IT staff to develop a long term strategic technology plan. The plan will take advantage of new and existing technologies to produce a pragmatic and effective future roadmap that enables the organization to fulfill its overall mandate in the community.
- **Solution design** – Solution packages (e.g., hardware, software, licensing) and associated consolidation of data
- **Network and email system monitoring** – 24/7 monitoring of RRPDC's network and email services with proactive communication and escalation protocols based on the severity of any unscheduled outages.
- **Patch management** – the process that helps acquire, test and install multiple patches (code changes) on existing applications and software tools on a computer, enabling systems to stay updated on existing patches and determining which patches are the appropriate ones.
- **Network and Workstation Security** – Install and manage the selected virus protections application. Provide intrusion detection and protection services to provide a safe and secure working environment.
- **Procurement management** – Selection of commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.
- **Move, Add, Change (MAC)** – Changes to the location or configuration of existing equipment or software, and installation of additional equipment or software.
- **Warranty, break fixes and installation** – Planned and on-call services, including emergency response to server issues.
- **Technical support** – Ability to support RRPDC's inquiries as required, via a combination of on-site support and help desk, including support for remote users.
- **Reporting and communication** – Ensuring monthly reporting on all purchases, assets, current activities and issues, and project status reports.

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- **IT policy review and development** – Development of customized policies related to the use of technology.
- **Unit evaluation and testing** – Formal evaluation of new hardware
- **Implementation planning and guidance** – Assistance in deployment planning, project management and execution.
- **Image development and management services** – Assistance in planning and designing standard images.
- **Image loading** – Prior to delivery and installation.
- **Configuration** – Full assembly of hardware and software, including testing and burn-in.
- **PC deployment** – Delivery and setup of machines on-site.
- **On-site implementation of business applications** – Installation of non-image software.
- **Asset inventory management** – Tagging, tracking, and management of warehousing and inventory.
- **Life cycle management of hardware units** – Process for end-of-life notification, replacement, and asset decommissioning/disposal.
- **Software licensing control** – Oversight of automatic renewal of software applications and maintenance of appropriate documentation.
- **Software support** – Some level of desktop software support and user training is desirable.

5 **Optional Service and Hosting Requirements**

- **Hosted Server Solution** – While servers are located onsite at 9211 Forest Hill Avenue, the RRPDC would like each respondent to propose and submit a bid for a hosted solution. A brief explanation of your recommendation should be included with your proposal.
- **VoIP Recommendation** – Explain your business model and recommendation for the acquisition, implementation and support of a VoIP phone system.

6 **Selection Criteria**

RRPDC will use multiple criteria to select the most appropriate partner. Respondents are encouraged to be as aggressive and creative as possible in their proposals. The following list summarizes the major qualitative areas that will be evaluated, along with their overall weighting.

- Industry expertise and experience
- Demonstrated customer service quality and support
- Previous relevant experience
- Vendor strength and stability
- Account management
- Reporting capabilities
- Financial considerations

7 **Response Contents and Format**

Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Your response to this RFP will serve as the basis for the consideration of your potential as a partner.

8 Information Requirements

For the purposes of understanding more about your company and your ability to successfully fulfill this important RRPDC requirement, please provide the information below as part of your response, clearly referencing each specific question.

8.1 Corporate Information

1. Give a brief overview of your organization's involvement in providing IT value added services in the marketplace.
2. How long has the organization been in this business and what is your current market share?
3. Provide your organization's annual sales volumes
4. In what cities do you maintain offices?
5. Indicate the number of employees in your organization. How many of those are dedicated to account management and/or technical support?
6. How many are full-time vs. contract?
7. Please describe your relationships and experience with manufacturers and major distribution partners in the technology marketplace.
8. What differentiates your organization from your competitors in the marketplace and how will this be relevant to us?
9. Will you subcontract any components of the proposed solution to third party organizations? If so, please describe the components to be subcontracted and provide details of any agreement in place with the subcontracted firm/individuals as well as a summary of past work that you have successfully completed together.
10. Please describe your organization's experience in transitioning clients to public or private cloud technology from more traditional IT service models.
11. Please provide details of three current customer accounts that are similar in scope and requirements to those of RRPDC.

8.2 Proposed Approach and Solution

1. Please provide a proposed work plan for a migration to your organization as a RRPDC preferred vendor. Specifically, provide the following information:
 - i. Key activities
 - ii. Timing
 - iii. Information/resource requirements from RRPDC
 - iv. Deliverables
 - v. Key milestones, checkpoints, and other decision points
2. If we elect to move forward with your organization, what RRPDC resources would you require (e.g., information, data, staff resources, communication) during the course of migration and on an ongoing basis?
3. Please identify the team that will be assigned to the account and describe how you plan to interact with us and any third-party providers that may provide services to RRPDC.
4. Please describe your experience in providing the following value-added services:
 - a. Remote backup
 - b. Technology strategy planning
 - c. Solution design
 - d. Network and email system monitoring
 - e. Procurement management
 - f. Move, Add, Change (MAC)
 - g. Warranty, break fixes and installation
 - h. Technical support, including on-site and remote user support

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- i. Reporting and communication
 - j. IT policy review and development
 - k. Unit evaluation and testing
 - l. Implementation planning, project management and guidance
 - m. Image development and management services
 - n. Image loading
 - o. Configuration
 - p. PC deployment
 - q. On-site implementation of business applications
 - r. Asset inventory management
 - s. Life cycle management of hardware units
 - t. Software licensing control
 - u. Desktop software support and training
5. Please describe your experience in providing server technology and service for your customers, focusing on planning, implementation, and ongoing support.
 6. Can you provide specific examples of how you have worked with customers that began with significant technology limitations and helped to successfully transform them into organizations with well planned and executed technology strategies? What were the critical success factors in this transformation?
 7. How can we be confident that hardware pricing levels will be aggressive and will remain highly competitive over a multi-year period during which new models may be introduced?

8.3 Support

1. Describe fully your technical support options including the assistance request process, escalation process, support hours, response times, staffing levels, staff expertise, and physical location of the help desk.
2. Please provide details on your standard reporting capabilities.
3. Describe any documentation and support (e.g., user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.
4. What options are available for user training and technical training that may be required by our staff?
5. Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.
6. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?
7. The RRPDC user base varies considerably in its level of technical sophistication. Please describe your experience in successfully supporting users that may be remote and possess limited technical skills.

8.4 Financials

1. Describe the pricing model(s) that you typically employ for your standard services.
2. What is the standard markup that you charge on the following types of technology units:
 - a. Desktops
 - b. Laptops
 - c. Servers
 - d. Other hardware
 - e. Software
3. Please indicate the charges associated with each of the following services, including the key driver of each cost and whether it is included in a standard per-unit cost vs. charged on an ad hoc basis.

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- a. Remote backup
 - b. Technology strategy planning
 - c. Solution design
 - d. Network and email system monitoring
 - e. Procurement management
 - f. Move, Add, Change (MAC)
 - g. Warranty, break fixes and installation
 - h. Technical support
 - i. Reporting and communication
 - j. IT policy review and development
 - k. Unit evaluation and testing
 - l. Implementation planning and guidance
 - m. Image development and management services
 - n. Image loading
 - o. Configuration
 - p. PC deployment
 - q. On-site implementation of business applications
 - r. Asset inventory management
 - s. Life cycle management of hardware units
 - t. Software licensing control
 - u. Desktop software support and training
4. Do you offer service bundles and if so, describe the effect of this bundling on your pricing.

9 Communications and Response

Katherine Busser is the designated RRPDC representative for this initiative. For any information relative to this RFP, please direct operational inquiries to Katherine Busser and technical inquiries to Rex Hockemeyer. Use the contact information provided below:

Katherine Busser, COO
RRPDC
KBusser@richmondregional.org
804-323-2033

Rex Hockemeyer, Fractional CIO
Target Consulting, LLC
Rex.Hockemeyer@gmail.com
804-929-1074

10 Notification of Intent to Respond and Clarification Questions

Please indicate your intention to respond, by email, to the above email address by the *Intent to Respond and Questions Due* date outlined in the *Key Dates* table, (Section 13). In addition, please provide the contact details of the individual responsible for coordinating your RFP response. At the same time, we ask that you submit any clarification questions regarding the RFP. Answers will be provided to all respondents by the *Answers Provided* date.

11 Response Delivery Instructions

Please submit an electronic copy of your proposal to the email address indicated in the *Communications and Response* section above. All responses must be received on or before close of business (4:30 pm ET) on the *Proposals Due* date indicated in the *Key Dates* table (Section 13).

12 Vendor Presentations

Our intention is to hold presentations/demonstrations with one or more firms on the *Presentations* dates indicated in the *Key Dates* table (Section 13). The presentations will be held at RRPDC at

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9211 Forest Hill Avenue, Ste 200, Richmond, VA 23235. We will try to provide the successful firms with as much advance notice as possible.

13 Key Dates

Event	RFP Issued	Intent to Respond and Questions Due	Answers Provided	Proposals Due	Presentations
Date	08/13/2018	08/24/2018	08/31/2018	09/14/2018	September 20-30
Time	17:00 EDT	17:00 EDT	17:00 EDT	17:00 EDT	Various

14 No Obligation

The submission of a proposal shall not in any manner obligate RRPDC to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.

15 Agreement of Non-Disclosure

This document is considered to be proprietary and shall not be disclosed to any other party. It is designed, developed and submitted to potential partners of RRPDC solely for the benefit of RRPDC.

16 No Guarantee

RRPDC makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.