

**Request for Proposal  
(RFP)  
Town of Carolina Beach**

**IT Managed Services for Municipal Government Professional Service Request for Proposal**

**February 5, 2018**

**1.0 SUMMARY**

- 1.1 Request for Proposals: IT Managed Service Companies with proven experience and expertise in IT Managed Services for Municipal Governments are invited to submit fixed price (lump sum) and fixed monthly unit price proposals to provide professional services related to an IT Managed Service Project within the Town of Carolina Beach.
- 1.2 The Request for Proposal (RFP) does not constitute a contract for services performed or to be performed. Following the selection of the successful consultant (hereafter referred to as “Consultant”), the Town of Carolina Beach (hereafter referred to as “Town”), and the Consultant will negotiate a contract including a scope of services.
- 1.3 Services to be Performed: The Consultant’s services will consist of those listed in Appendix A.

**2.0 BACKGROUND**

- 2.1 Town’s Purpose of Project: Based on the Town’s research and municipal peer references, the town has decided to implement a Cloud Based IT Managed Services Model utilizing a Hosted Desktop Technology implementation. This must be a fully outsourced solution where the company assumes responsibility for all aspects of the town’s IT, i.e. the company must be the single point of contact for all staff and external vendors, for all IT related issues. The Town’s servers and PCs are to be virtualized in an appropriate data center. The Town’s business applications will run in this hosted server/PC environment and the staff’s individual desktop environment will be streamed to a local thin client style desktop device.
- 2.2 Information to be provided to Consultant by the Town: The Town will provide the Consultant with an existing hardware list in Appendix B.

**3.0 OBJECTIVES AND ENVISIONED SCOPE OF PROJECT**

- 3.1 Objective: The key objective of this project is to move the town into a Cloud Based IT Managed Services Model utilizing a Hosted Desktop Technology implementation.
- 3.2 Envisioned Scope of Project: The Town envisions the following minimum scope of services for the IT Managed Service Project:

- 3.2.1 Task 1 – Project kickoff meeting – The first task of the project will entail an initial meeting or conference call to discuss the scope of the project as outlined in the proposal.
  - 3.2.2 Task 2 – System Analysis – The second task of the project will entail a detailed analysis and mapping of all existing systems and proposed configuration of virtual office.
  - 3.2.3 Task 3 – Deployment & Migration – The third task of the project will entail deployment of hardware and software and migration services form existing vendor and system to new hosted system.
  - 3.2.4 Task 4 – Support and VCIO Services – The forth task of the project will entail the development of support service routines and establishment of the VCIO Services.
  - 3.2.5 Task 5 – Preparation and delivery of final project report – Upon completion of the IT Managed Service Project, the Consultant will compile the results of the project and prepare a summary report of the IT Managed Service System.
- 3.3 Schedule for Completion: While the intermediate milestones for completion of the various tasks involved in the project are to be proposed by the Consultant, the Town requires that the project be completed in all respects (including submittal of the final deliverables to the Town) no later than November 1, 2018.

## **4.0 DELIVERABLES**

- 4.1 The Consultant is to provide all services outlines in Appendix A to complete project.

## **5.0 COMMERCIAL**

- 5.1 Insurance Requirements: Any contract entered into as a result of this RFP may require the Consultant to obtain and maintain certain minimum insurance coverage. Without limiting any liabilities or other obligations of proposer, successful proposers performing as independent Consultants hereunder, shall be fully responsible for providing Worker’s Compensation, General Liability, Professional Liability, and Automotive Liability coverages.

The successful proposer must provide a Certificate of Insurance within fifteen (15) calendar days after notification of award. Certification must include: name and address of insurance company (must be authorized to conduct business in North Carolina or be named on the List of Authorized Insurance maintained by the NC Department of Insurance), policy number, and liability coverage and amounts.

## 6.0 SUBMITTAL REQUIREMENTS

6.1 General: Please submit one electronic copy, submitted to the email address below and one hard copy (total of two copies) of your proposal in a sealed envelope, no later than February 26, 2018 at 2:00 pm to the attention of:

Michael Cramer  
Town of Carolina Beach  
1121 N. Lake Park Blvd  
Carolina Beach, NC 28428  
[michael.cramer@carolinabeach.org](mailto:michael.cramer@carolinabeach.org)

In the interest of fairness to all proposing consultants and to facilitate timely review of all the proposals by the Town, proposals received after the scheduled receipt time stated above will not be accepted and will be returned to the sender marked "LATE". All proposals received on time become the property of the Town and will not be returned.

6.2 Proposal Organization: To facilitate the Town's objective review of the proposals, the Consultants are requested to organize the main document as follows. If the Consultant wishes to submit additional information in support of or to strengthen the proposal, please provide such information separately in Appendices.

6.2.1 A letter on company letterhead indicated that the proposal represents an offer by the firm to provide services for the stated fee according to the stated schedule. A Principal of the firm authorized to commit the firm must sign the letter.

6.2.2 Table of Contents

6.2.3 Information of the following topics:

6.2.3.1 Executive Summary: Should address the highlights of the proposal, along with the strengths and special expertise of the firm and the associated team to successfully accomplish the objectives of this project. Please limit the summary to no more than two pages.

6.2.3.2 Technical Proposal: Identify and describe the services identified in Appendix A that you will provide and the approach/methodology proposed to be used for implementation.

6.2.3.3 Cost Proposal: Please provide the cost of the professional consultant services based on the services identified in Appendix A and project deliverables describe in Sections 3 and 4 of this RFP, respectively, with any additional qualifications and clarifications that you may deem appropriate. The project cost estimate should be

sufficiently detailed and include breakdowns (of both time and materials) for the various tasks and deliverables.

- 6.2.3.4 Schedule: Please provide the proposed time schedule for the completion of the project. The schedule should be detailed enough to show the sequence and duration of implementation of the various tasks involved, any tasks to be performed or information to be provided by the Town including their timings, the anticipated critical path, float times provided to accommodate unanticipated delays and other contingencies, and scheduled project milestones.
- 6.2.3.5 Project Team and Project Management: Please provide the proposed project team (including any proposed subconsultants) and personnel for the successful performance of this project. Please include resumes for the project team.
- 6.2.3.6 Deliverables: Please list and describe the contents and format of the project deliverables, using the envisioned deliverables for Section 4 as a guide.
- 6.2.3.7 Basis of Compensation: The Town requests a fixed fee (lump sum) and fixed monthly unit price proposal for Consultant compensation for this project. Please confirm this proposed basis for compensation for the cost proposal in item 6.2.3.3 above.

Also, please provide the proposed basis (i.e. hourly rates for project team members) for compensation for additional work that may need to be performed for the completion of project tasks that represent substantial changes from the scope of work agreed upon in the contract.

## **7.0 SELECTION OF CONSULTANT**

- 7.1 General: This RFP does not commit the Town to enter into agreement, to pay any costs incurred in the preparation of a proposal in response to this request or in subsequent negotiations, or to procure a contract for the project. The Town will require the selected proposer, if any, to participate in negotiations and to submit such cost, technical and/or other revisions to the proposals as may result from negotiations. The Town reserves the right to perform all or some of the services described in this RFP with its own work force.
- 7.2 Selection Criteria: Proposals will be evaluated, scored, and ranked based upon the following criteria. It is not envisioned that interviews will be a requirement for selection of the Consultant for this project. However, the Town reserves the right to request an interview for any potential Consultants during the selection process. Should the Town see the need to interview potential Consultants, the potential Consultants will

be notified as early as possible in the proposal review process, and selection schedules adjusted accordingly.

7.2.1 Responsiveness to the Town's RFP;

7.2.2 Relevant experience, expertise, and qualifications of the firm and project team members;

7.2.3 Technical proposal;

7.2.4 Cost estimate; and

7.3 Schedule for the Selection Process: The following is the anticipated schedule for the Consultant selection process.

<u>Item</u>	<u>Date</u>
Town issues RFP	<b>February 5, 2018</b>
Completed Proposals due to Town	<b>February 26, 2018</b>
Town selects Consultant	<b>March 12, 2018</b>
Submittal by the selected Consultant to the Town of complete and signed Contract documents.	<b>March 26, 2018</b>
Town formal approval and signature of Contract	<b>April 9, 2018</b>
(Written) Notice to Proceed (NTP) with work	<b>May 1, 2018</b>

7.4 Proposed Work Schedule: The following is the proposed work schedule for this project.

Begin Project Work	Following NTP
Complete Project Work	<b>No Later Than November 1, 2018</b>

## Appendix A

### ***IT Managed Services for Municipal Government***

#### Solution Preference

Based on the Town's research and municipal peer references, the town has decided to implement a Cloud Based IT Managed Services Model utilizing a Hosted Desktop Technology implementation. This must be a fully outsourced solution where the company assumes responsibility for all aspects of the town's IT, i.e. the company must be the single point of contact for all staff and external vendors, for all IT related issues. The Town's servers and PCs are to be virtualized in an appropriate data center. The Town's business applications will run in this hosted server/PC environment and the staff's individual desktop environment will be streamed to a local thin client style desktop device.

The company must provide the following services and support items, covered in the fixed monthly fee:

- **Assets**
  - Hardware
    - Servers
    - PCs
  - Infrastructure Software Licensing
    - Server OS
    - PC OS
    - MS Office 365 Office Suite
    - MS Office Email
    - Anti-Spam/Anti-Virus
    - Virtualization Software
    - Backup & Disaster Recovery Software
- **Monitoring Services**
  - 7x24 Monitoring & Alerts
  - 7x24 Incident Response Services
  - Performance Data Collection and Reporting
  - Managed Anti-Virus/Anti-Spam
  - Virus Incident Reporting
  - Backups Monitor and Management
  - Malware Filtering
  - DLP - Data Loss Prevention
- **Managed Services**
  - IT Director Services
  - Single Point of Contact for all IT Issues
  - Managed Server Support
  - Managed Network Support
  - 7x24 Remote Support
  - 7x24 Onsite Support availability
  - 3rd Party Vendor Management
  - Managed PC Support
  - Remote/Mobile Access for all staff

- Cloud Backups
  - Cloud Disaster Recovery Services
  - 50 GB Email Storage/User
  - 1 TB Personal Storage/User
  - 1 TB Shared Storage for User Groups
- VCIO – IT Director Services
  - The selected vendor must include a Virtual CIO (IT Director) as part of their managed service solution. This individual’s function is dedicated to overseeing the successful management of the Town’s IT operations. The VCIO must have significant CIO level experience in managing, planning, and budgeting IT operations for major entities. It is not an acceptable solution for a vendor’s day-to-day support engineer to also perform the VCIO function. This must be a dedicated function.
- References
  - Provide at least four (4) municipal references of similar size and scope. These had to have been active accounts for at least the last 12 months where your company provided full outsourced IT managed services for all Town and Police functions. Include a contact name, phone number, services provided, length of service, and email address.
- Endorsements
  - List all Local Government Association endorsements the company currently has, including any special business terms or pricing the endorsement affords the Town. Provide a name, telephone number, and email for a contact at each association.
- Line-of-Business Application Experience
  - The company should have significant functional experience with a wide variety of different local government specific line-of-business software applications where IT support and third-party vendor coordination has been provided.
- CJIS Security Requirements and Background Checks
  - Certify that all company support engineers and support staff have:
    - Successfully completed the FBI Criminal Justice Information System (CJIS) Security & Awareness Training Course for the Level 1 CJIS Security Test with a valid NC law enforcement agency.
    - Passed the FBI CJIS / NCIC law enforcement background check to verify no pertinent criminal history.
    - Complete a Federal Bureau of Investigation national fingerprint database search.
    - Approval to access networks that connect to the Federal Bureau of Investigation’s (FBI) National Crime Information Center (NCIC) Systems, therefore meeting the requirements needed for local law enforcement audits.
  - Company offers an enhanced security CJIS compliant hosting environment for Police related applications.
- Data Center Hosting Environment
  - The town’s IT infrastructure will reside in the company provided enterprise class data center. The data center must have the appropriate hardware, software, networking, storage, security, and internet connectivity to support the town’s needs for a Fully Hosted Desktop Solution. The town’s primary hosted environment must be implemented in a **Private Cloud Model** (not a Public Cloud Model) which is backed up daily to an alternate data center geographically displaced from the original.

**It is mandatory that all data centers involved in providing the Hosted Desk Top solution must be independently audited and maintain a SSAE17 Soc 2 – Type 2 accreditation.**

- The data centers must, as a minimum, have the following attributes:
  - **Monitoring:** 24x7x365 Network Operations Center monitoring of devices. The data center is also monitored for temperature, humidity, and standing water.
  - **Infrastructure:** Redundant A/C, Uninterruptible Power Supply (UPS) and generator backed power
  - **Network:** Leverages multiple internet carriers and utilizes redundant cabling, switching and routing
  - **Data Storage Backup:** Redundant server and storage capabilities achieved through Storage Area Network (SAN) and virtualization technologies. Daily offsite storage of backup media as well as online replication to an alternate data center geographically displaced from the original.
  - **Waterless fire suppression system:** System reaches extinguishing levels in 10 seconds or less, stopping ordinary combustible, electrical, and flammable liquid fires before they cause significant damage.
  - **Physical access barriers:**
    - Access card required to gain entry to data center door.
    - Finger Vein Reader protecting data center door. Vein patterns are very difficult to replicate, making forgery virtually impossible and ensuring maximum security.
    - Data center alarms on any forced entry or entry without biometric authentication.
    - Cameras with infrared lighting record during a power or lighting failure
  - **Additional Security Details:**
    - Necessary controls in place and the data center's security is audited on a regular basis.
    - Highly available redundant firewalls
    - Internal monitoring of IPS and network security
    - Third party security monitoring with completely separate IPS and log management devices. All data is stored offsite and not modifiable by company.
    - Encrypted system back-ups are stored offsite
- Dedicated Project Management Function
  - The company must have a dedicated Project Management Team utilizing the guidelines set forth by the Project Management Body of Knowledge (PMBOK) best practices. PMBOK practices are expected to be used to provide the fundamentals of project management by following the guidelines (Initiating, Planning, Executing, Monitoring and Controlling, and Closing) to successfully accomplish project objectives and ensure customer satisfaction.
- Client Relationship Management
  - Support Staff
    - Provide the number of support staff buy function. Each support individual can only be listed once. (provide employee name)
      - # of VCIOs (IT directors)
      - # of dedicated Help Desk Engineers
      - # of System Engineers
      - # of Technical Team Leads
      - # of Level 3 Escalation Engineers (domain experts)
      - # of Account Managers (primary business contact)

- # of Data Center Infrastructure Engineers
    - # of Project Managers
    - # of Application Development Engineers
  - Domain Expertise
    - Provide the number of individuals and their certifications with specific domain expertise:
      - PCs
      - MS Servers
      - MS 365
      - Microsoft SharePoint
      - Networking
      - Virtualization
      - Storage Systems
      - Security
      - MS Power BI
- Hours of operation for Help Desk Support
  - The Town desires the company to staff its helpdesk function with actual company employees (not an answering service) from 7:00 am Monday through 7:00 AM Saturday. Support requests during other times can be answered by a call answering service and relayed to the appropriate company on-call support engineer.
- Monitoring, Alerting, and Management Tools
  - Name of **ITIL based Helpdesk System** that would be used to support the town?
  - Name of **RMM System** that would be used to support the town?
  - Name of **Network Monitoring System** that would be used to support the town?
- Breadth of Solution Offerings
  - The town is looking for a partner with broad solution experience, including multiple engineers with domain expertise in each relevant technology. Check the solution categories where you have existing installations for at least the last 12 months.
    - \_\_\_ Premise Based Managed Services
    - \_\_\_ Hosted Desktop Cloud Based Managed Services
    - \_\_\_ Cloud Based Backups
    - \_\_\_ Cloud based full Solution Disaster Recovery
    - \_\_\_ CJIS specific support Services
    - \_\_\_ CJIS compliant hosting environment
    - \_\_\_ Hardware as a Service (HaaS)
    - \_\_\_ Cloud & Premise Based VoIP Solutions
    - \_\_\_ Security Assessments
    - \_\_\_ Website Design & Hosting
    - \_\_\_ Certified SharePoint Design & Consulting Services
    - \_\_\_ Application Development Services
    - \_\_\_ Managed Printers Services

## Appendix B Existing Hardware / Software List

### # of Computers per Department:

	Address	# of Desktop Computers
Operations Administration		9
Planning Dept.		9
Executive Dept.		12
Finance Dept.		3
Town Clerk		2
HR		2
Town Hall TOTAL	1121 Lake Park Blvd. N	37
Police Dept.	1121 Lake Park Blvd. N	20
Operations Building	1121 Lake Park Blvd. N	6
Recreation Center	1121 Lake Park Blvd. N	3
Fire Department	9 Dow Rd. S.	15
Waste Water Treatment Plant Office	404 Dow Rd. S.	2
WWTP Lab	404 Dow Rd. S.	1
SCADA Building	404 Dow Rd. S.	4
Beach Ranger Station	1708 Canal Dr.	1

Servers are as follows:

### Physical Servers-Software Installed:

- **Town Hall-4:**
  - TCB-GIS-ArcGIS, Crystal Reports, SQL Server
  - TCB-HOST1-none
  - TCB-SRV-Solarwinds, SQL Server
  - TCB-TERM-CitiPak, Gotomeeting, MS Office, FMS, Carolinabeachnc SQL Server, Aclara STAR, WinSCP
- **Police Department-1:**
  - TCBPD-HOST1-none
- **Fire Department-1:**
  - TCB-SRV4-Firehouse software, SQL Server

### Virtual Servers-Software Installed:

- **Town Hall-5:**
  - VM-TCB-SWAPP – ArcGIS
  - VM-TCB-CWWEB - ArcGIS Web Adapter, Crystal Reports
  - VM-TCB-CWDB - SQL Server (Cityworks)
  - VM-TCB-LASERFICHE – Laserfiche, SQL Server
  - VM-TCB-FMS – FMS, SQL Server
- **Police Department-3:**
  - VM-TCBPD – SRV Policepak
  - VM-TCBPD – TS1 Southern Software RMS, MS Office, NC PolicePak, CityPak
  - VM-TCBPD-App SQL Server, Southern Software RMS, Quartermaster