



REQUEST FOR PROPOSALS

Network Upgrades & Information Technology Managed Service Provider

OVERVIEW

The Central Vermont Regional Planning Commission (CVRPC) invites qualified firms to submit a proposal to facilitate a transition to cloud-based technology and serve as its Managed Service Provider for a five-year period. Questions regarding this Request for Proposals (RFP) may be directed to Brian Voigt, Program Manager, Central Vermont Regional Planning Commission via email at voigt@cvregion.com with the subject "MSP RFP Question". Please submit questions by 19 October 2023 at 4:00 PM. Answers to questions received by the deadline will be compiled into a single document and attached to the bid advertisement on the [Vermont Bid Registry](#) and posted to the [CVRPC website](#). Answers will be posted on or before 20 October 2023. If changes are made to this RFP, an addendum will be issued to firms that express interest and provide CVRPC with contact information (i.e. registered vendors). An addendum will also be attached to the original advertisement on the [Vermont Bid Registry](#) and posted to the [CVRPC website](#). **Proposals are due 26 October 2023 at 4:00 PM.**

CVRPC encourages qualified disadvantaged (DBE) and women-owned (WBE) businesses to submit proposals. Proposals are required to document whether the individual is a DBE or WBE. CVRPC, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252, 42 U.S.C. §§ 2000b to 2000b-4) and its associated Regulations, hereby notifies all bidders that it will affirmatively ensure that any contract entered into pursuant to this advertisement, will afford DBE and WBE full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award. It is the policy of CVRPC that DBEs have the opportunity to participate to the maximum extent feasible in procurement and contracting.

CVRPC is an Equal Opportunity Employer.

SCHEDULE

5 October 2023	Request for Proposals issued
9 - 23 October 2023	Required meetings between prospective firms and CVRPC
19 October 2023	Deadline for submission of questions
20 October 2023	Response to questions posted
26 October 2023	Proposals Due, 4:00 PM
2 November 2023	Contractor Notification
7 November 2023	Contract Start
6 November 2028	Contract Completion

Prospective firms must meet with CVRPC to review the current IT system and future requirements prior to submitting a proposal. Firms that have engaged with CVRPC since 1 January 2023 are exempt from this requirement. Contact Brian Voigt (voigt@cvregion.com) to schedule a meeting time to review the current IT system.

BACKGROUND

CVRPC works to assist its member municipalities in providing effective local government and to work cooperatively with them to address regional issues. As one of eleven regional planning commissions enabled through 24 VSA §4341, CVRPC is a political subdivision of the State of Vermont. CVRPC employs between 7-12 staff working on land use, environmental, emergency management and transportation planning issues throughout central Vermont. Staff work both in the Montpelier office and remotely. Remote access involves authenticating credentials with the CVRPC firewall and connecting to a computer through a remote desktop connection. Most remote work is performed using a personal (non-CVRPC) computer.

CVRPC computer resources include a mix of Windows 10 and Windows 11 desktop and laptop computers connected to an HPE ProLiant DL380 Gen 10 server. In addition, there is a copier / printer / fax machine and a large-format plotter. Staff use the Microsoft Office suite, QuickBooks and ArcGIS in addition to limited use of discipline-specific software (e.g. STARnext). The network is protected by a Fortinet Fortigate 60E firewall and Bitdefender Endpoint Security (deployed on individual computers). Data stored on the server is backed up to the cloud and to a local NAS.

Generally speaking, the network hardware is out of date and needs to be retired and / or replaced. In addition, the network should be hardened to protect against malware, viruses and unauthorized access, among other threats. Finally, CVRPC

would like to migrate its resources and workflows to a Microsoft 365 environment. To meet these objectives, CVRPC is seeking a proactive and responsive IT consultant with a proven track record of improving client workflow and efficiency, expertise in technology strategy and the ability to provide cost-effective solutions.

SCOPE OF WORK

Task 1: Network hardware upgrade

CVRPC anticipates retiring the existing server and transitioning the bulk of its data resources to the cloud. In addition to server retirement, there are likely other hardware concerns which need to be addressed to maintain continuity of operation. The Fortinet Fortigate 60E firewall needs to be replaced. The contractor shall assess the need for new PoE Switches, wireless access points, battery backups (UPS) and power distribution units (PDU), as well as any miscellaneous hardware, adaptors and / or cables. Upgrades may involve onsite wiring work to provide new drops to offices and the conference room. The contractor must configure the security settings and firewall, settings for data backups, networking to all other computers, printers, and phones in the office. The installation and configuration of new hardware must be completed in such a manner that minimizes impacts to the regular operations of CVRPC. Current hardware and software specifications are available upon request.

Proposals should include a written assessment of the current network condition and a plan (with cost estimate) to modernize network infrastructure to meet CVRPC's needs. At the conclusion of this network upgrade, the contractor will define and document the network structure in a report to CVRPC.

Task 2: Microsoft 365 Migration & Implementation

The consultant will prepare a readiness assessment for migrating to Microsoft 365, identify potential challenges and solutions, and develop a migration strategy that minimizes impacts to staff. The migration strategy will address the integration of Microsoft Active Directory (including single sign-on), plans for User Identity and Account Provisioning, data loss prevention, assessment and documentation of client configurations (including necessary changes from current configuration standards), migration of mail boxes and public folders and training for CVRPC IT staff.

For this task, the contractor will be expected to: 1) secure the Microsoft 365 email, file storage and productivity environments, including updating existing licenses and configuring email security; 2) assist with the creation of shared spaces for cloud-based collaboration; 3) help with file migration; 4) coordinate Office application upgrades to "Apps for Business"; 5) add centralvtplanning.org to Microsoft 365 and

reconfigure to match web branding; and 6) provide documentation of the work performed. Proposals should include a detailed cost estimate for implementing the deliverables listed above.

Task 3: Managed Services

The contractor will document all client technology to provide operations and support services and align partner access with Microsoft 365, and provide support for the following:

- 1) **Remote workstation support during core business hours (9:00 AM – 5:00 PM, Monday through Friday):** Microsoft and 3rd party updates (weekly), hardware updates (monthly), warranty tracking, endpoint security management and monitoring, anti-virus and malware monitoring, and security and event log monitoring.
- 2) **Remote server support (Windows-based and security software) during core business hours (9:00 AM – 5:00 PM, Monday through Friday):** Change management, validate and respond to system / performance / network alerts, technical remediation of server or network issues, routine system updates endpoint security management and monitoring, anti-virus and malware monitoring, and security and event log monitoring, and documentation of effort(s).
- 3) **Firewall management and monitoring:** management of network switches and wireless access points: Change management (policy, account, IP address, WIFI updates); validate and respond to system, performance and network alerts; monitor network switches, Wi-Fi access points, router and firewall operations and availability; technical remediation of server or network issues; routine system updates; license tracking; firewall security audit and adjustment (monthly) and documentation of effort(s).
- 4) **Microsoft 365 server support, management and monitoring:** Change management (add / remove users, email policies, shared resources), validate and respond to system, performance and network alerts, email security integration (phish test, suspicious email reporting, dark web monitoring), technical remediation of issues, routine system checks, end-user training and documentation of effort(s).
- 5) **Reporting:** monthly technology reports and quarterly technology business review (report and roadmap).

Proposals should include a detailed cost proposal (cost per month) to provide managed services support for the five sub-tasks listed above.

PROPOSED TIMELINE

Task	Date	Deliverable
0	7 November 2023	Signed contract with CVRPC
1	1 December 2023	Needs assessment: replacement needs, plan and cost estimate
1	15 January 2024	Network hardware upgrade complete
2	15 January 2024	Microsoft 365 migration and implementation plan
2	15 February 2024	Microsoft 365 migration and implementation complete
3	Ongoing - As needed	Remote workstation and server support
3	Ongoing - As needed	Firewall management and support
3	Ongoing - As needed	Microsoft 365 server support, management and monitoring
3	Weekly	Microsoft and 3 rd party updates
3	Monthly	Firewall security audit and adjustment; technology reports
3	Quarterly	Technology business review (report and roadmap)

PROPOSALS

Firms responding to this RFP shall propose a Scope of Services necessary to complete the Scope of Work described herein. The proposal must describe how the firm intends to complete the Scope of Services, establish a project schedule, and identify any required CVRPC project support for all phases of the project. In addition, the proposal shall contain the following sections:

TECHNICAL QUALIFICATIONS

- 1) A cover letter demonstrating an understanding of the services requested through this RFP.
- 2) A Scope of Services, including cost proposals.
- 3) A description of the firm, including addresses of all offices proposed for involvement in this project, structure of the firm, size of the firm, number of years the firm has been in business, the firm's experience with similar IT systems and a statement of the firm's financial stability.

- 4) A list of staff who will work on the contract, including names, education, professional licenses, registrations or certifications, relevant experience (resumes are acceptable), and role in the contract. CVRPC must preapprove use of any staff not identified in the proposal.
- 5) Examples of relevant past experience for a minimum of three references, including a brief description of the project, contact person, phone number, and address of reference. References should demonstrate the experience of the specific staff proposed to work under CVRPC contract. CVRPC reserves the right to check references beyond those provided by the contractor.
- 6) The Selected Contractor will be required to add CVRPC and its officers and employees as an additional insured for services performed. The proposal must demonstrate that either the contractor currently has insurance or is eligible for insurance.

COST PROPOSAL

- 1) Identify costs by task and person hours.
- 2) List an hourly rate(s) by individual(s) providing services.
- 3) Detail other expenses, including but not limited to overhead rate, travel, fees, mileage reimbursement.
- 4) Provide project cost by task and a total project cost.

SUBMISSION REQUIREMENTS

Proposals must be submitted by 26 October 2023 at 4:00 PM. Proposals submitted after the deadline will not be considered. Proposals must be submitted via email to Brian Voigt, Senior Planner (voigt@cvregion.com) with the following Subject line "Managed Services Provider Proposal". Proposals sent via fax or mail will not be considered. Alternative delivery methods may be arranged by request.

Once submitted, the proposal becomes the property of CVRPC. A contractor may correct, modify or withdraw a response to this RFP via written notice to Brian Voigt (voigt@cvregion.com) prior to the submission deadline. Modifications must be submitted electronically and clearly labeled "Modification No. ___". Each modification must be numbered in sequence, and must reference the original RFP.

After the opening of responses to this RFP by CVRPC, a contractor may not change any provision of the response in a manner prejudicial to the interests of CVRPC or fair competition. If a mistake and the intended correct wording are clearly evident on the face of the response document, the mistake will be corrected to reflect the intended correct meaning and the contractor will be notified in writing. Contractors may not withdraw responses to this RFP so corrected. A contractor may withdraw an

opened response to this RFP if a mistake is clearly evident on the face of the response document, but the intended correct wording is not similarly evident.

PROPOSAL EVALUATION

All proposals will be evaluated by a selection committee composed of CVRPC staff. Proposals will be ranked according to the following criteria:

1. Scope of Work Format and Contents (10%):
 - a. Is the proposal written in concise language understandable to a non-technical audience?
 - b. Is the proposal complete, well organized, responsive to the project requirements, and easily navigable?
 - c. Does the proposal show understanding of the process necessary to complete project tasks including stakeholder involvement and construction oversight?
2. Qualifications and Responsiveness (60%):
 - a. Do the personnel to be assigned to this project have the necessary qualifications to conduct this work?
 - b. Do the personnel to be assigned to this project have experience in support and maintenance for similar systems and organizations?
 - c. Does the firm have a proven record of successful completion of similar work within time and budget constraints?
 - d. Are communication skills responsive to the audience that will be served?
 - e. If multiple staff will be used to serve this contract, do the assigned staff members demonstrate success working with each other as a team?
 - f. Is the contractor's availability and accessibility adequate for CVRPC's needs?
3. Cost Proposal (10%):
 - a. Is the cost proposal thorough and clearly linked to the proposed Scope of Services?
 - b. Are rates and costs reflective of an efficient level of effort necessary to complete the task, compensation reflective of level of expertise, materials appropriate to the task and expectations of quality, and overall reasonable costs as accepted in the industry?
4. References (20%):
 - a. What types of services did the contractor provide to the reference?
 - b. How satisfied was the reference with contractor interactions?
 - c. How satisfied was the reference with the contractor's technical expertise, ability to meet deadlines and budgets, reporting, public outreach, and

- overall value and quality of work?
- d. Did the contractor demonstrate value-added expertise? If so, how?
 - e. Was the reference satisfied with how the contractor dealt with problems that arose? Example(s) of problems and their solutions.
 - f. Did the reference experience any challenges with the contractor?
 - g. How does this contractor compare with others the reference has worked with?
 - h. Would the reference recommend the contractor for providing the described Scope of Services and desired qualifications?

DISCLAIMER

CVRPC assumes neither responsibility nor liability for costs incurred relevant to the preparation and submission of the proposal or any other costs prior to issuance of a contract. The expense of preparing, submitting, and presenting a proposal is the sole responsibility of the applicant.

CVRPC reserves the right to examine all aspects of responses submitted, tangible and intangible. CVRPC reserves the right to seek clarification of any statement submitted, conduct interviews with contractors, and to select a contractor that is best able to provide the requested services and promote the public interest. CVRPC reserves the right to withdraw this RFP, and/or to advertise for new submissions at any time if it is in the best interest of CVRPC to do so. A contract will be awarded as deemed to be in the best interest of CVRPC.

CVRPC retains the right to reject any and all proposals received, to interview or not interview any or all firms responding to this RFP prior to selection, to negotiate with any qualified source, or to cancel in part or in its entirety this RFP if it determines such action to be in the best interest of CVRPC or that of eligible parties. Reasons for cancellation or rejection will be provided to all registered vendors in writing. This solicitation in no way obligates CVRPC to award a contract.

If any proposer is aggrieved by the proposed award of the contract, they may appeal in writing, via U.S. Mail or Delivery Service or via email to CVRPC at:

Central Vermont Regional Planning Commission
Attn: Brian Voigt, Senior Planner
29 Main Street, Suite 4
Montpelier, Vermont 05602
E-mail: voigt@cvregion.com

The appeal must be postmarked or sent within fourteen (14) calendar days following the date of the written notice to award the contract.

STANDARDS AND DELIVERABLES

- 1) All reports are to:
 - a. be presented for ease of readability by the average citizen;
 - b. include photographs, charts, graphs, maps, and other graphics as appropriate;
 - c. include executive summaries or abstracts suitable for broad distribution;
 - d. include a glossary of technical terms; and
 - e. include a reference list for all sources of data and information.
- 2) Reports must be provided in digital form (Microsoft Word for report text and Portable Document Format (PDF) for full report). Presentations must be provided in digital form (Microsoft PowerPoint or PDF). Images (photographs, charts, graphs, maps, and other graphics) must be provided as individual files for use by CVRPC. Spatial data developed with project money must be provided in digital form (as ESRI shapefiles (vector data) and GeoTiff (raster data)).
- 3) Advance copies of all reports and documents, including drafts, should be provided to CVRPC *at least one week prior* to any scheduled review or discussion.
- 4) All data, databases, reports, programs and materials, in digital and hard copy formats, created under this contract must become the property of CVRPC.

CONTRACTING PROVISIONS

CONTRACT COMPLETION

Performance under the scope of work must be completed by the dates indicated in the Project Schedule section of this RFP.

PAYMENT

The amount and timing of payments will be determined during contract negotiations. Requests for payments must be made directly to CVRPC, and payments made must equal 100% of the requested amount for eligible services. CVRPC anticipates making payments within 30 days of invoicing.

OWNERSHIP OF MATERIAL

All rights, titles to and ownership of the data, material, and documentation resulting from this contract and/or prepared for CVRPC pursuant to a contract between CVRPC and the Selected Contractor must remain with CVRPC.

COMPLIANCE WITH STATE AND FEDERAL LAWS

The Selected Consultant and Selected Contractor must comply with any and all applicable laws, statutes, ordinances, rules, regulations, and/or requirements of federal, state, and local governments and agencies thereof, which relate to or in any manner affect the performance of this agreement. CVRPC receives funding from numerous state and federal agencies. Those requirements imposed upon CVRPC as a recipient or sub-recipient of state and federal funds are thereby passed along to the Selected Consultant and Selected Contractor and any sub-contractors. Those rights reserved by the state or federal government are likewise reserved by CVRPC.

Pursuant to State of Vermont Laws, anyone in any matter relative to the procurement of services who intentionally makes a material statement that is false, omits or conceals a material fact in a written statement, submits or invites reliance on a material writing that is false, submits or invites reliance on a sample or other object that is misleading, or uses any trick, scheme or device that is misleading in a material respect will be subject to sanction pursuant to the laws of the State of Vermont.