

STAFF REPORT



MEETING DATE:	2/24/15
SUBJECT:	Issue Request for Proposals for Agency Information Technology (IT) Support Services
AGENDA ITEM:	6-8
STAFF CONTACT:	Sean Tiedgen, AICP, Senior Transportation Planner

STAFF RECOMMENDATION:

It is recommended that the board of directors authorize the executive director to issue a request for proposals (RFP) for agency information technology (IT) support services over a five-year term ending June 30, 2020.

DISCUSSION:

IT support services are required to maintain office equipment, protect electronic resources, backup agency files, procure new equipment, fix malfunctioning equipment, and provide technical support to staff. These services exclude fixed costs such as phone and internet provider service; software (i.e. Microsoft Office, QuickBooks, ArcGIS, Cube, Adobe); maintenance of SRTA's multifunction printer; website maintenance and webhosting; and equipment replacement.

SRTA's current contract with Apex Technology Management Inc. (Apex) for on-call support services ends June 30, 2015. A RFP must be issued to acquire competitively priced services. Staff proposes a five-year contract to stabilize cost rates and minimize disruption of services.

ALTERNATIVES:

The board of directors may request modifications to the RFP scope of work and terms.

FINANCING:

On-call IT support services are reimbursed to SRTA through the Indirect Cost Allocation Plan. SRTA's current contract with Apex totaled \$46,845 for three years.

A handwritten signature in blue ink, appearing to read "D. Little", is written over a horizontal line.

Daniel S. Little, AICP, Executive Director

Attachment: Request for Proposals for Information Technology Support Services
(Draft)

REQUEST FOR PROPOSALS

On-call Information Technology (IT) Support Services

Issued **[Insert Date]**

Submittals are due by 5:00 PM on **[Insert Due Date]**

Shasta Regional Transportation Agency
1255 East Street, Suite 202
Redding, CA 96001
(530) 262-6190



2015 SRTA Board Members and Agency Partners

Board Members

Susie Baugh, chair	City of Anderson
Pam Giacomini	County of Shasta
Kristen Schreder	City of Redding
David Kehoe	County of Shasta
Missy McArthur, vice chair	Redding Area Bus Authority
Leonard Moty	County of Shasta
Greg Watkins	City of Shasta Lake

Agency Partners

Caltrans, District 2
City of Anderson
City of Redding
City of Shasta Lake
County of Shasta
North State Super Region
Pit River Tribe
Redding Area Bus Authority (RABA)
Redding Rancheria (Yana, Wintu, Pit River)
Shasta Senior Nutrition Programs
Far North Regional GIS Council

Introduction

The Shasta Regional Transportation Agency (SRTA) serves as the Metropolitan Planning Organization (MPO) and Regional Transportation Planning Agency (RTPA) for the cities of Anderson, Redding and Shasta Lake, and the county of Shasta. SRTA studies the region's transportation needs, plans and programs transportation improvements, and pursues all potential funding sources.

SRTA is seeking a qualified consultant to provide monthly service plus on-call task orders for agency information technology (IT) support services for a five-year term. This will be a 'Fixed Price' and 'Time-and-Materials' contract.

The ideal vendor will provide technical support, system maintenance and backups, hardware and software troubleshooting, assistance with equipment procurement, assistance with website hosting and domain management, and documentation and tracking of SRTA's hardware and software inventory.

Background

SRTA is located at 1255 East Street, Redding, California, which is made up of three suites (101, 201 and 202). SRTA currently occupies suite 202, which is approximately 3,217 square feet in size. The suite is made up of a waiting room/lobby area, media space, break room, server room, conference room, and seven office spaces.

SRTA's technology infrastructure consists of approximately the following:

- 8 PCs in use
- 2 backup PCs
- 2 laptops (one Macbook, one Windows)
- 2 tablets (one iPad, one Surface)
- 1 networked printer
- 1 networked copier (multi-function machine)
- 3 – Windows server 2008 (including SQL server)
- 1 Postage machine (optima 30)
- ESI-50 Communication Server: 3 ESI60 phones, 5 ESI40 phones and voicemail
- 1 Polycom SoundStation2 phone
- 2 AT&T cell phones (iPhone 6 Plus and Nokia)
- Windows 7 Professional operating systems

SRTA's specialized software includes:

- Quickbooks
- ESRI ArcGIS (2 licenses)
- Citilabs Cube Enterprise License
- Adobe Creative Cloud and Adobe Web Premium licenses

- Microsoft Office Professional 2010

The following site is included in this proposal for IT support services:

SRTA Building
1255 East Street, Suite 202
Redding, CA 96001
Phone: (530) 262-6190
Fax: (530) 262-6189

Project Scope of Work

SRTA is seeking a qualified consultant to provide monthly service plus on-call task orders for agency information technology (IT) support services for a five-year term. Submitted proposals must address the following needs outlined below.

A: Asset Tracking, Budget Reports and Strategic Planning

SRTA maintains an excel document for managing the agency's IT assets. This includes maintaining an inventory, keeping track of warranty expiration dates, managing annual software license renewals, estimating equipment life expectancy and replacements costs, and estimating annual IT budgets. The selected consultant will assist SRTA in maintaining this document; reviewing the agency's IT assets; and making recommendations on equipment maintenance and upgrades to keep all systems running smoothly and to avoid interruption of business activities.

The consultant will also assist SRTA in preparing the agency's annual IT budget. This will consist of reviewing the agency's assets and future needs, estimating costs and preparing a report with budget recommendations. This report will be prepared and submitted to SRTA annually by February 1.

Deliverables:

- Maintain quarterly IT Asset tracker report
- Annual budget recommendations report

B: Workstation support services

Consultants will be expected to perform basic support functions, including, but not limited to, the setup and installation of desktops, laptops, tablets, peripherals and office software; diagnosis and correction of desktop application problems; configuring PC's, laptops and tablets for standard applications; removal of bloatware; and identification and correction of user hardware problems, including advanced troubleshooting as needed.

Deliverables:

- Work order quotes and invoices (as applicable)
- Tickets for tracking project status
- Monthly activity reports

C: Network administration and server support services

The consultant is expected to ensure networks and servers are running smoothly, secure and reliable so that there is no significant downtime during SRTA's normal work hours. Consultant tasks should include, but are not limited to, the following:

- Maintenance and support of network equipment, including switches, firewalls, routes and other security devices, as needed.
- Management of networks and computer systems, including: complex applications; databases; servers and associated hardware; software; communications (as applicable); and operating systems.
- Installation and maintenance of network devices; ensure workstations are connected to networked printers and scanners; routine configuration changes, and installation of patches and upgrades; minor cabling (as needed); and network and server analysis.
- Scheduling of preventative maintenance that minimizes impact to staff during work hours; maintenance of help desk tickets; support of software products related to servers and workstations; and timely response to repair and maintenance work.

Deliverables:

- Work order quotes and invoices (as applicable)
- Tickets for tracking project status
- Monthly activity reports

D: Email, Remote Access, Security and Backup Support

The consultant will ensure SRTA's systems are secure and provide email, remote access and backup support. Tasks anticipated include, but are not limited to, the following:

- Maintenance of SRTA email accounts using the agency domain; adding, changing and/or deleting employee accounts as requested; maintenance of virus detection programs on servers and staff computers, laptops, tablets and other appropriate devices; configuration of SRTA's systems to enable remote access in a secure environment.
- Performance of periodic security audits, including notification of suspected breaches of security to the Executive Director or his/her designee.

Deliverables:

- Work order quotes and invoices (as applicable)
- Tickets for tracking project status
- Monthly activity reports

E: Support Services

SRTA's standard work hours are Monday through Friday, from 8:00 A.M. to 5:00 P.M., excluding twelve holidays per year. The consultant, at a minimum, should be available during these hours to provide remote Help Desk, phone and on-site support services. Consultants should also be available before and after work hours, as needed, and be able to maintain 24/7 monitoring of

SRTA's systems to ensure SRTA's systems are running properly. Procedures should be in place to receive alert notifications in case of equipment failure. Consultant should be able to provide monthly and annual reports on help desk tickets, service requests, network health, available server space, and patches.

F: Purchasing

SRTA staff duties and technological needs vary. The consultant is expected to become sufficiently familiar with SRTA's functions and staff to be able to recommend equipment and standard office software applications that meet SRTA's office needs. Consultant should assist SRTA in necessary procurement consistent with SRTA's adopted policies.

Deliverables:

- Work order quotes and invoices
- Tickets for tracking project status

Not Included

The contract to be awarded does not obligate SRTA to purchase computer equipment, replacement parts, hardware devices, cabling, licenses, or software et al. from the vendor awarded this service contract. This scope also does not include computer equipment, software and networks not owned by SRTA such as PRI (Primary Rate Interface) or PBX (Private Branch Exchange) systems.

Project Timeline

The contract to be awarded will be for a five-year period, whereupon a new procurement process will be initiated. The contract will start July 1, 2015 and end June 30, 2020. Subject to SRTA Board of Directors approval, the terms of the agreement may be extended at the end of the agreement by the executive director for up to six month at a prorated amount, if needed, to avoid a gap or disruption of services.

Proposal Contents

Consultants interested in providing the services specified in this RFP must submit a written proposal, not to exceed 35 pages (excluding attachments). At a minimum, the following information should be included and clearly labeled:

1. Transmittal letter signed by an officer who may contractually bind the business, including a description of the firm.
2. Statement of understanding of the scope of work and project management approach.
3. Statement of qualifications and experience, including list of the personnel on the project team (resumes may be included as an attachment). This includes sub consultants, if any, proposed for use.

4. Representative list of similar projects, but not more than five, completed within the last five years including: project description and services provided, budget and schedule performance, and contact information for the client reference.
5. Cost proposal (fully inclusive of all services, overhead, and direct expenses), including:
 - a. Part A - A fixed monthly service fee; and
 - b. Part B - A fee schedule on a time (by position) and materials basis for on-call service tasks outside of the monthly service fee.

RFP Questions, RFP Schedule, and Contact Person

SRTA will develop a mailing list for all interested applicants. Questions concerning this RFP may be directed as noted below where they will be collected and responded to collectively, and made available for all interested applicants via the SRTA website. All questions, must be submitted by email no later than 5:00 pm on [Insert date here]. **No oral questions will be taken or responded to.** Responses to questions will be posted on the SRTA website on [Insert date here]. All interested applicants are encouraged to register for the mailing list so that they are notified appropriately should any changes to the RFP occur.

Contact Person

Sean Tiedgen, AICP
 Senior Transportation Planner
stiedgen@srta.ca.gov
 530-262-6185

The following RFP schedule is anticipated:

Tasks	Deadline
Release RFP	TBD
Interested Vendor Questions Due	TBD
SRTA Response to Vendor Questions	TBD
Vendor Proposals Due	By 5:00 P.M. on Date TBD
Evaluation and Ranking of Proposals	TBD
Interviews (if necessary)	TBD
Negotiate Contract with Most Qualified Vendor	TBD
SRTA Board of Directors Approval	April 28, 2015
Contract Start	July 1, 2015

Proposal Evaluation

The proposals received shall be reviewed by a consultant evaluation panel according to the criteria/weighting per Figure 2 below. The Executive Director will forward the results of the evaluation to the SRTA Board of Directors for approval.

Proposal evaluation will be based on the scoring criteria presented in Figure 2 and interviews, if necessary. Consultants may be invited to interview at the discretion of SRTA. Should interviews be requested, SRTA will provide a list of questions including how they will be scored before the interviews. Presentations may be allowed, with a specified time limit.

Figure 2 – Scoring Criteria

Criteria	Scoring Weight %
Comprehension, understanding of the project	10
Thoroughness of proposal	10
Meeting the RFP objectives	20
Project delivery time	5
Qualifications, experience and credentials of the consulting firm and project team	20
Local knowledge demonstration	5
References	10
DBE participation level	5
Reasonableness of cost	15
Total:	100
Interviews (optional)	15

Contract Amount and Award

The contract amount will be determined based on proposed fees and funding availability. Contract will be awarded to the highest ranking proposal, including value provided for proposed fee. SRTA estimates the worth of the IT support services contract to total \$75,000 over five years, or approximately \$15,000 annually.

The proposal shall be signed by an individual authorized to bind the offer of said proposal. The proposal shall be a firm offer for a minimum of 90 days, and contain a statement to that effect. The proposal shall contain a statement that all work (Part A and Part B of cost proposal) will be performed at a not-to-exceed price.

The executive director of SRTA will schedule the proposed contract for consideration by the SRTA Board of Directors on Tuesday, April 28, 2015. The contract is not in force until approved by the SRTA Board of Directors and written authorization to proceed is provided.

Protest Procedure

All protests must be in writing within five (5) business days from the results notification and at least ten (10) days prior to a SRTA Board of Directors meeting in order for the protest to be considered at that meeting. Send protests signed by the protesting party or an authorized agent to the SRTA executive director. Include a description of the relief or corrective action in the protest. The protest should stipulate an issue of fact concerning the following points:

- A matter of bias, discrimination, or conflict of interest on the part of an evaluator(s);
- Errors in computing the score; and/or
- Non-compliance with procedures described in this RFP or SRTA's established policies.

SRTA will only consider protests based on the above matters. SRTA will reject protests without merit if they address issues such as: 1) an evaluator's professional judgment on the objective quality of a proposal; or 2) SRTA's assessment of its own and/or other agencies needs or requirements. SRTA will review and respond to protests in a timely manner.

Proposal Submittal

Please submit one original proposal, signed by an officer of the firm authorized to bind the firm contractually, and three (3) copies (total of 4) to:

**Shasta Regional Transportation Agency
Attn: Sean Tiedgen, AICP, Senior Transportation Planner
1255 East Street, Suite 202
Redding, CA 96001**

Submittals must be received before **5:00 PM on [Insert day of week and date here]**. No proposals will be accepted after this time.

The cost of preparing and submitting a proposal, pre-contract meetings, and participating in an interview—if held—are at the sole expense of the proposer. SRTA reserves the right to reject any or all proposals, and to waive any informality, technical defect, or clerical error in any proposal at SRTA's discretion. Solicitation of proposals in no way obligates SRTA to contract with any firm or individual. The decision to approve and award a contract is at the discretion of SRTA.

Public Records Act: All proposals submitted in response to the RFP will become the exclusive property of SRTA. At such time the SRTA executive director recommends a proposal to the board of directors and such recommendation appears on the board agenda, all proposals submitted in response to the RFP shall become a matter of public record and shall be regarded as public records. **If there are any trade or proprietary secrets included by the consultant, the consultant may provide a different copy of the proposal that would be acceptable to release to the public. If an alternate document is not made available to SRTA by the consultant, then**

the original proposal, as submitted, will be released as requested. Proprietary information can include secret formulas, processes, and methods used in production. It can also include a company's business and marketing plans, salary structure, customer lists, contracts, and details of its computer systems. In some cases, the special knowledge and skills that an employee has learned on the job are considered to be a company's proprietary information.

Modification or Withdrawal of Proposal: Any proposal received prior to the deadline may be withdrawn or modified either personally, through e-mail, or by written request of the consultant. To be considered, the modification must be received in writing, with the same number of copies as the original proposal, prior to the deadline. Negligence on the part of a proposer in preparing the proposal confers no right of withdrawal of the proposal after the proposal has been opened. No proposal may be withdrawn for a period of 60 days following the proposal deadline.

RFP Addendum(a): Any changes to the RFP will be made by written addendum(a) issued by SRTA, and shall be considered part of the RFP. The RFP deadline may be extended dependent upon the nature of the changes issued. Upon issuance, such addenda shall be incorporated into the agreement documents, and shall prevail over inconsistent provisions of earlier issued documentation and be forwarded to prospective consultants and posted on-line. It will be the consultant's responsibility to assure that all addenda are incorporated into the proposal as required according to all the terms and conditions for submittal of the proposal. In no event will SRTA modify the RFP with less than five (5) days remaining to the deadline, without extending the RFP deadline.

Verbal Agreement or Conversation: No prior, current, or post-award verbal conversations or agreement(s) with any officer, agent, or employee of SRTA shall affect or modify any terms or obligations of this RFP, or any contract resulting from this procurement.

Special Funding Considerations: Any contract resulting from this RFP will be financed with funds available to SRTA. The contract for this service is contingent upon the provision of these funds to SRTA. In the event these funds are reduced or eliminated, SRTA reserves the right to terminate or revise any contract.

Alternatives: Consultants may not alter any requirement of the RFP in the response to the RFP. If the consultant brings to SRTA's attention, at least fifteen (15) days before the RFP deadline, a more efficient and/or alternative way to reach the end product than the scope delineates, SRTA reserves the right to cancel the RFP and re-bid the project. Since SRTA desires to enter into one contract to provide all of the intended services, only those proposals to provide all services will be considered.

DBE Requirement: SRTA has determined that disadvantaged business enterprises, as defined in 49 CFR Part 26, will have the opportunity to compete fairly for contracts financed, in whole or in part, with federal funds. SRTA has established a disadvantaged business enterprise (DBE) goal of 9% for federal fiscal years 2012/2013/2014 beginning October 1, 2011 through

September 30, 2014.

Buy America: Buy America regulations apply to federally assisted procurements, typically development and/or construction activities subject to a NEPA determination, exceeding certain amounts. Buy America Regulations require the consultant to provide goods produced or manufactured in the US, unless the federal government has granted a waiver authorized by those regulations.

Equal Employment Opportunity/Affirmative Action: In awarding a contract to a consultant, SRTA includes language within the contract which requires the consultant to certify their compliance with federal regulations.

Audit and Indirect Costs: As required by 49 U.S.C. Section 5325(b)(3), all federally assisted contracts and subcontracts including program management, architectural engineering, feasibility studies, preliminary engineering, design, architectural, engineering, surveying, mapping or related services must be performed (i.e. a consultant cannot incur and invoice the agency any unallowable, unallocable, or unreasonable costs prohibited by the Federal Acquisition Regulations (FAR) and/or the contract terms and conditions) and audited in accordance with FAR Part 31 cost principles. The consultant, its sub-consultants, and sub-recipients must accept FAR indirect cost rates for one-year applicable accounting periods established by a cognizant federal or state government agency, if those rates are not currently under dispute, and these established rates will apply for purposes of contract estimation, negotiation, administration, reporting, change order, options, and payments, not limited by administrative or de facto ceilings.