City of Santa Maria

REQUEST FOR PROPOSALS

Microsoft 365 License Purchase, Implementation and Migration Services

ISSUING OFFICE: City of Santa Maria
Information Technology
110 East Cook Street, Room 7
Santa Maria, CA 93454
1 PURPOSE:

The City of Santa Maria, CA (hereafter “City”) is seeking proposals from qualified vendors to provide Microsoft 365 Gov Cloud system integration and implementation services. The scope of the project will be migrating the City from an on premise Exchange instance to an MS 365 hosted environment in Microsoft’s government cloud.

The awarded vendor will assist the City in performing a readiness assessment of the existing infrastructure including gathering and documenting requirements, developing a migration plan and executing the plan. Vendor will provide services needed to migrate approximately 640 mailboxes to Exchange Online with email archiving, eDiscovery, anti-malware and anti-spam filtering capabilities. The goal is to provide a seamless transition to MS 365 Gov Cloud architecture while maintaining secure and robust access to and from cloud services.

The City desires to implement a phased approach to rolling out MS 365 Gov applications to users beginning with Exchange Online, Office Online, and OneDrive and gradually introducing the other MS 365 applications such as Teams, SharePoint Online, Delve, Sway, Forms, PowerApps, PowerBI, Security, Compliance, Stream, Power Automate, and others.

City employees provide a wide range of services for the residents of Santa Maria and, as such, have varying needs for the many MS 365 Gov features. Some may need only Exchange online, others may need Exchange Online and Office Online and others may need the entire suite of applications. Accordingly, the City is seeking a licensing model that enables the use of a combination of G1, G3 and G5 licenses and the ability to easily switch between them as needed.

2 BACKGROUND:

The City of Santa Maria was incorporated on September 12, 1905 and is located in Santa Barbara County on the west coast of California in what is known as the Central Coast. Santa Maria is the largest City by population and geographic area in the County. The City provides a full range of municipal services including police and fire services, engineering and planning, street maintenance, parks and recreation services, water and wastewater utilities, solid waste collection and disposal, and general administrative activities. The City is organized into 10 departments. The information technology functions of the City are centralized.

The City’s environment is as follows and accurate as of 12/16/2019.

- There are approximately 640 network users
- City staff, generally, has no familiarity with MS 365 and will need a significant amount of training and ongoing training/support options.
- The City is predominantly a PC/Windows environment with some use of iPads for mobile workers
- Windows OS counts:
  - Windows 10: 385 (60%)
  - Windows 7: 255 (40%)
- Types of smart phones in use: Android and iPhone (various models)
- The City is primarily a Microsoft shop for Office applications
- IT staff manages all technology with support from contractors for specialty applications
• The City’s 30+ physical locations are connected to the core network using a combination of fiber and microwave connections
• The City operates 2 data centers
• City staff currently access the internet through 3 internet POPs with upload/download speeds of up to 3GB/3GB.
• The current on premise Exchange environment is:
  o Version: 2010 – 14.03.0361.001
  o Running on 2 Windows Server 2008 R2 servers (CAS and MBX)
  o Total storage (TB): 2.84 TB (MBX)
  o Total licenses (mailboxes) in use: 780 (currently cleaning up unused mailboxes)
  o Approximately 306 email groups
• The City uses an SMTP relay to enable applications to send email

3 CONTRACT AGREEMENT:

The City’s standard Professional Services Agreement shall be used (included as Attachment “A” for reference). The proposing company shall meet the requirements of this agreement and shall submit, with the proposal, a specific list of any concerns with the City’s Agreement.

4 NON-DISCRIMINATION REQUIREMENT:

By submitting a proposal, the respondent represents that it and its subsidiaries do not and will not discriminate against any employee or applicant for employment on the basis of race, religion, sex, color, national origin, sexual orientation, ancestry, marital status, physical condition, pregnancy or pregnancy-related conditions, political affiliations or opinion, age, or medical condition.

5 SCOPE OF WORK:

5.1 The Scope of Work will include:
  A detailed technical solution document which will provide a thorough and clearly-defined plan for a seamless migration to MS 365 Gov including a significant focus on communication and training requirements.

5.2 MS 365 Gov Readiness Assessment, Onsite Discovery, and Planning
• Onsite review of City systems to gather and capture information about existing infrastructure
• Identify potential challenges in this migration and pose solutions
• Recommend a solid communications and training plan for the City’s users based on best practices such as; lunch and learns, web based training, train-the-trainer and at-desk materials.
• Networking and Naming Services Planning
• Determine required tasks for configuring network and DNS
• User identity and account provisioning planning
• Planning considerations to implement directory synchronization
• Plan for Active Directory Federation Services for use with single sign-on
• Exchange Online Planning
• Develop migration strategy
• Identify mailbox size and item counts that will be migrated to MS 365 Gov
• Determine mail-enabled applications and plan for configuration
• Conduct bandwidth assessment to calculate migration velocity for mailbox data
• Determine user counts for G1, G3 and G5 licenses
5.3 Preparing Environment for an MS 365 Gov Deployment
- Implement enterprise-wide training with employees
- Prepare end-user documentation on Outlook and the new MS 365 environment
- Assist with Domain Verification and MS 365 Gov Registration
- Add and verify the City’s domain name with MS 365 Gov
- Create DNS records to configure the City’s domain name for use with MS 365 Gov services
- Configure on-premises AD for directory synchronization
- Deploy and configure Active Directory Federation Services to enable single sign-on
- Exchange Online Service Configuration
- Configure mail coexistence with existing server and Exchange Online
- Anti-spam and malware protection

5.4 Migration and Cutover
- Assign licenses to users
- Migrate and synchronize mailbox data to Exchange Online
- Update DNS to point to MS 365 Gov
- Configure Outlook Web Access and Exchange ActiveSync for mobile phones and devices where applicable
- Perform Post-migration Service Testing of MS 365 Gov functionality

5.5 Post Deployment Support and MS 365 Gov Administration Training
- Have resources on-site and able to augment the City’s support staff on the week after the migration is completed
- Onsite or Webinar Training with IT Staff
- Administering MS 365 Gov Services
- MS 365 Gov Admin Best Practices
- Managing DirSync
- Administering Microsoft System Center
- 40 Hours of Service Desk Support to be used within a 1 Year Term

6 SUBMISSION REQUIREMENTS:

6.1 Overview of Firm: a brief outline of Proposer’s experience along with pertinent corporate details including full legal company name; year business was established; and number of people currently employed.

6.2 Capability to Implement: a clear statement of the Proposer’s capability to deliver on the requirements set forth in this document.

6.3 Client List: a client list for similar projects completed in the last three years for three different clients.

6.4 Project and Client Management: a detailed description of the approach and methodology for managing the project and client relationships.

6.5 Project Management Team: a detailed description of the Proposer’s project management team including skills, experience and capabilities of relevant staff.

6.6 Proposed Project Schedule. The City desires MS 365 Gov (Exchange Online, Office Online and OneDrive) to be in full production no later than April 30, 2020. Proposers shall provide a detailed breakdown of all deliverables identified in the Scope of Work including, methods, tools and timeline to complete the project. With specific reference to:
a. Performing a technical readiness assessment
b. Developing the appropriate MS licensing model
c. Implementation and migration plan
d. A phased migration with cutover happening on designated weekend(s)
e. Migrating all users, data, and message archives
f. Detailed plan for communication and training
g. End user documentation, with screen shots and easy to read instructions, covering how to use Exchange Online, Office Online and OneDrive.
h. Training methodologies such as, Microsoft online training, classroom training, lunch and learns, web-based training, etc.

6.7 Project Costs: The Proposer shall provide the total fixed price for the project based on the Scope of Work outlined above and include line items for:

a. Cost and timeframe for developing the implementation and migration plan
b. MS 365 licensing using the following breakdown of product licensing for comparison purposes (the actual breakdown of licenses may vary upon completion of the implementation and migration plan):
   i. 40 G1 Licenses
   ii. 400 G3 Licenses
   iii. 200 G5 Licenses
c. Cost and estimated timeframe for professional services for implementation and migration
d. Cost and training plan for delivering end-user and administrator training

7 PROPOSAL REVIEW TIMELINE:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date (COB)</th>
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<tbody>
<tr>
<td>Issue Date of RFP</td>
<td>12/20/2019</td>
</tr>
<tr>
<td>Deadline for Questions</td>
<td></td>
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<tr>
<td>Submit questions to: <a href="mailto:jmarecic@cityofsantamaria.org">jmarecic@cityofsantamaria.org</a></td>
<td>12/30/2019</td>
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<tr>
<td>Date for Issuing Addenda</td>
<td>1/6/2020</td>
</tr>
<tr>
<td>Proposal Submission Deadline</td>
<td>1/13/2020</td>
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<tr>
<td>Evaluation of Proposals</td>
<td>1/13/2020 – 1/17/2020</td>
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<tr>
<td>Contract Award</td>
<td>1/20/2020</td>
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8 PROPOSAL EVALUATION PROCEDURE:

8.1 The degree to which a proposal meets the requirements of the RFP are solely within the judgment of the City’s evaluation committee.

8.2 Proposers must respond to this solicitation by submitting all data required herein in order for the proposal to be evaluated and considered for award. Failure to submit such data shall be sufficient cause for disqualification or a proposal from further consideration of award.

8.3 Proposal shall undergo a three-stage evaluation process:
Stage I will consist of a review to determine which proposals comply with all the mandatory requirements.

Stage II will consist of scoring by the City of each qualified Proposal on the basis of the Rated Criteria.

Stage III will consist of a scoring of the pricing submitted by Proposers, the evaluation of price/cost shall be undertaken after the evaluation of mandatory requirements and any rated requirements has been completed.

Cumulative Scores
At the conclusion of Stage III, all scores from Stage II and Stage III will be added and, subject to satisfactory reference checks, and the express and implied rights of the City the highest scoring proposals may be selected for an onsite interview/demonstration. If the City determines that one proposal clearly presents a “best value”, the City may go straight to award.

9 PROPOSAL SCORING CRITERIA

The following is an overview of the criteria and weightings of the rated criteria of the RFP.

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>MAX SCORE</th>
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<tbody>
<tr>
<td>A comprehensive MS365 migration project plan with technical details on how the vendor will migrate current contents seamlessly to an MS365 environment</td>
<td>20</td>
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<tr>
<td>A comprehensive communication, documentation and training section in the overall project plan</td>
<td>20</td>
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<td>Capability to meet project timelines</td>
<td>20</td>
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<tr>
<td>Product and service history and references</td>
<td>20</td>
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<tr>
<td>Pricing</td>
<td>50</td>
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<td>TOTAL</td>
<td>130</td>
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10 PROPOSAL SUBMISSION CRITERIA

10.1 Questions prior to proposal submission should be directed to:

Jeffrey M. Marecic  
jmarecic@cityofsantamaria.org

10.2 Sealed proposals are to be addressed and delivered to:

City of Santa Maria  
110 E. Cook Street, Room 7  
Santa Maria, CA 93454  
Attn: Jeffrey M. Marecic
10.3 Proposers must submit 4 hardcopy proposals signed by an authorized representative and one (1) electronic copy on a USB Drive in a sealed envelope.
10.4 Proposals submitted by facsimile or email will not be considered.
10.5 The City will not be responsible for any costs incurred in the preparation of the Proposer’s submission. Once received the submission becomes the property of the City.

11 ACCEPTANCE, AWARD OR REJECTION

11.1 The City reserves the right to terminate the process without awarding the contract.
11.2 The City reserves the right to accept or reject any part, or all, of each proposal submission and/or not to make an award if none of the proposals received meet the requirements.
11.3 The City may negotiate minor adjustments with the selected Proposer prior to the final award of the contract.
11.4 The awarding of the contract is subject to the availability of funds for this statement of work. Should all proposals received exceed the available budgeted funds and the highest ranked Proposer’s costs are within the City’s total current year budget, the City reserves the right to negotiate with the highest ranked Proposer.
11.5 The City will not be responsible in law or in equity to any Proposer for any claim for losses or damages, or any other relief, arising out of this RFP process including the selection or rejection of any particular section of this proposal.
11.6 The City’s interpretation of the contents of the official proposal documents shall prevail.

12 CONFIDENTIALITY

The Proposer shall treat and maintain as confidential any and all information provided by the City in connection with the RFP.

13 UNDERSTANDING OF REQUIREMENTS

The submission of a proposal for the provision of this service will be considered a representation that the Proposer has carefully investigated all conditions which may affect the delivery of the services outlined in this proposal and that the Proposer is fully informed as to the conditions which may be encountered and the volume and the quantity of the work to be performed.
ATTACHMENT A

AGREEMENT FOR PROFESSIONAL SERVICES

This Agreement is made on [date], by and between [firm name], a California Corporation ("Contractor") and the City of Santa Maria, a California Municipal Corporation and charter city ("City"), in Santa Maria, California, based on the following recitals:

1. [insert text];
2. [insert text];
3. [Insert text].

NOW, THEREFORE, IT IS AGREED:

1. **Recitals true.** The above recitals are true.

2. **General.**
   2.01. **Term and Termination.** The term of this contract is [insert text], beginning on the date first written above. This contract may be extended by mutual consent of the parties. This contract may be terminated for breach of its terms or conditions, or because of discovery of any act which violates local, state or federal law. Termination is effective 14 days after deposit of notice as specified in this Agreement.
   2.02. **Services to be Performed.** Contractor shall determine the method, details and means of providing [insert text] services. More specifically, Contractor agrees to perform the specific services listed in Exhibit “A.”
   2.03. **City’s Duties.** City’s duties under this Agreement are to cooperate with Contractor in the performance of the contract and timely pay invoices.
   2.04. **Payment.** Payment terms under this Agreement are listed in Exhibit “B.”
   2.05. **Insurance.** Contractor shall provide insurance as listed in Exhibit “C.”
   2.06. **Exhibits.** Exhibits “A,” “B,” and “C” are attached and incorporated.

3. **Contractor’s Obligations.**
   3.01. **Minimum Amount of Service.** Contractor shall devote sufficient time to perform services under this agreement efficiently and effectively. Contractor may represent, perform services for and be employed by additional individuals or entities, in Contractor’s sole discretion, as long as the performance of these extra-contractual services does not interfere with or present a conflict with City’s business.
   3.02. **Tools and Equipment.** Except as otherwise stated in this Agreement, Contractor will supply all tools and equipment necessary to perform this Agreement.
   3.03. **Status.** Contractor (including its employees) is an independent contractor. No employer/employee relationship exists between Contractor and the City. Contractor's assigned personnel shall not be entitled to any benefits payable to employees of the City. The City is not required to make any deductions or withholdings from the compensation payable to Contractor under this agreement.
3.04. **Indemnification.** To the fullest extent permitted by law, the Consultant shall indemnify, defend (with independent counsel approved by the City) and hold harmless the City, and its directors, officers, and employees from and against all liabilities (including without limitation all claims, losses, damages, penalties, fines, and judgments, associated investigation and administrative expenses, and defense costs, including but not limited to reasonable attorneys’ fees, court costs and costs of alternative dispute resolution) regardless of nature or type that arise out of, pertain to, or relate to the negligence, reckless, or willful misconduct of the Consultant or the acts or omissions of an employee, agent or subcontractor of the Consultant. The provisions of this paragraph survive completion of the services or the termination of this contract. The provisions of this Section are not limited by the provisions of the Section relating to insurance.

4. **Miscellaneous**

4.01. **Notices.** All communication relating to the day-to-day activities of this Agreement shall be exchanged between a designated representative of the CITY and a representative of CONTRACTOR, listed below. All notices shall be addressed as follows unless a written change is filed with the City:

To City:  
Attn. Jeffrey M. Marecic, CIO  
110 East Cook Street, Room 7  
Santa Maria, CA 93454  
Ph: 805-925-0951 ext. 2236

To Contractor:

If the designated Representative or address of either party changes during the term of this agreement, a written notice shall be given to the other party prior to the effective date of change. Any written notices required under this agreement shall be effective five (5) days after deposit into United States mail, postage prepaid, addressed to the designated Representative, or upon confirmation of receipt of delivery if another notification process is used.

4.02. **Compliance With Laws, etc.** Contractor shall comply with all laws, including but not limited to the rules and policies of the City, in performing this agreement.

4.03. **Integration.** This agreement constitutes the entire agreement of the parties with respect to the subject matter. All modifications, amendments, or waivers of the terms of this agreement must be in writing and signed by the appropriate representatives of the parties.

4.04. **Interpretation.** This agreement shall be interpreted in accordance with the laws of the State of California.

4.05. **Jurisdiction.** Jurisdiction and venue of all disputes over the terms of this agreement shall be in the County of Northern Santa Barbara, State of California.

4.06. **Warranty of authority.** Each person signing this agreement on behalf of a party warrants that he or she has authority to do so.

4.07. **No Waiver.** Failure to enforce with respect to a default shall not be construed as a waiver.

4.08. **Severability.** The provisions of this agreement are severable. If any part of this agreement is held invalid by a court of competent jurisdiction, the remainder
of the agreement shall remain in full force and effect unless amended or modified by mutual written consent of the parties.

4.09. **Submittals.** In addition to any other submittals required by this agreement, Contractor shall submit copies of its current business license and current certificate of workers compensation coverage to the City before beginning work on this project.

4.10 **Prevailing Wage.** Prevailing Wage. If applicable, Consultant and all sub-consultants are required to pay the general prevailing wage rates of per diem wages and overtime and holiday wages determined by the Director of the Department of Industrial Relations under Section 1720 et seq. of the California Labor Code. The Director's determination is on file and open to inspection at www.dir.ca.gov and is referred to and made a part hereof; the wage rates therein ascertained, determined and specified are referred to and made a part hereof as though fully set forth herein.

IN WITNESS WHEREOF, this agreement is executed by the parties on the date first written above.

[Firm Name],
a California Corporation

CITY OF SANTA MARIA, a political subdivision of the State of California

[Principal Name]
Principal

ATTEST:

Rhonda M. White, CMC
Chief Deputy City Clerk

APPROVED AS TO FORM:

Risk Manager

City Attorney
EXHIBIT “A”

SERVICES TO BE PERFORMED
EXHIBIT “B”

PAYMENT TERMS
EXHIBIT “C”

INSURANCE REQUIREMENTS

Consultant shall procure and maintain for the duration of the contact insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Consultant, his/her agents, representatives, or employees. If the contractor maintains broader coverage and/or higher limits than the minimums shown above, the City requires and shall be entitled to the broader coverage and/or higher limits maintained by the contractor.

A. Minimum Scope of Insurance

Coverage shall be at least as broad as:

1. Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001), including products and completed operations, property damage, bodily injury and personal & advertising injury.

2. Insurance Services Office Business Auto Coverage Form Number CA 00 01 covering any auto (Code 1), or if Contractor has no owned autos, covering hired (Code 8) and non-owned autos (Code 9).

3. Workers’ Compensation insurance as required by the State of California and Employer’s Liability Insurance.

4. Errors and Omissions liability insurance appropriate to the Consultant's profession. Architects’ and engineers’ coverage is to be endorsed to include contractual liability.

B. Minimum Limits of Insurance

Consultant shall maintain limits no less than:

1. General Liability - $2,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.

2. Automobile Liability - $1,000,000 per accident for bodily injury and property damage.

4. Employer's Liability - $1,000,000 per accident for bodily injury or disease.

5. Errors and Omissions Liability - $1,000,000 per occurrence or claim, $2,000,000 aggregate.

C. Self-insured Retentions
   1. Self-insured retentions must be declared to and approved by the City. The City may require the Consultant to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration and defense expenses within the retention.

D. Other Insurance Provisions

   The commercial general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

   1. The City, its officers, officials, employees and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form or an endorsement to the Contractor's insurance (at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10, CG 20 26, CG 20 33, or CG 20 38 and CG 20 37 forms if later revisions are used).

   2. For any claims related to this project, the Consultant's insurance coverage shall be primary insurance coverage at least as broad as ISO CG 20 01 04 13 as respects the City, its officers, officials, employees and volunteers. Any insurance or self-insurance maintained by the City, its officers, officials, employees or volunteers shall be excess of the Consultant's insurance and shall not contribute with it.

   3. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled or reduced, except with notice stating the title of this contract to the City. All notices provided pursuant to this Agreement shall be given to the City representative listed for notice in this agreement and shall specify the title of this Agreement. Notice may be given by overnight mail, facsimile with confirmation of receipt, or certified mail.
with return-receipt requested.

4. Consultant hereby grants to City a waiver of any right to subrogation which any insurer of said Consultant may acquire against the City by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City has received a waiver of subrogation endorsement from the insurer.

5. If any of the required policies provide claims-made coverage:
   a. The Retroactive Date must be shown, and must be before the date of the contract or the beginning of contract work.
   b. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work.
   c. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Consultant must purchase “extended reporting” coverage for a minimum of five (5) years after completion of work.

E. Acceptability of Insurers

   1. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to the City.

F. Verification of Coverage

   1. Consultant shall furnish the City with original certificates and amendatory endorsements of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by the City before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. The City reserves the right to require complete, certified copies of all required insurance policies, including endorsements effecting the coverage required by these specifications at any time.

G. Special Risks or Circumstances

   1. Entity reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.