

# **REQUEST FOR PROPOSAL DISTRICT OF LOGAN LAKE**

## **INFORMATION TECHNOLOGY MANAGED SERVICES**

**Request for Proposals No.: RFP-2023-07**

**Issued: April 25th, 2023**

**Submission Deadline: May 19th, 2023; 14:00 local time**

**Deliver to: [pgaudry@loganlake.ca](mailto:pgaudry@loganlake.ca)**

**Prepared by:  
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Logan Lake, BC V0K 1W0**

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## Section A: Invitation and Submission Instructions

### **SUPPLY AND SERVICES: RFP-2023-07 Information Technology Managed Services for the District of Logan Lake.**

This Request for Proposals (the “RFP”) is an invitation by the District of Logan Lake (the “District”) to prospective proponents to submit proposals for the supply and services of Information Technology (IT) Managed Services. The services primarily include, but are not limited to, Server, Workstation, and Network Management, as well as one-off IT projects/initiatives as further described in Section E of this RFP (the “Deliverables”).

The RFP is posted and available for download on the BC Bid website ([www.bcbid.ca](http://www.bcbid.ca)), and District website ([www.loganlake.ca](http://www.loganlake.ca)). Please note that it is the responsibility of the proponent to occasionally check the website to ensure they receive all addendums that may be posted there.

Proponents are requested to return separate pdf responses to **Sections D, E, F and G**, electronically to [pgaudry@loganlake.ca](mailto:pgaudry@loganlake.ca) clearly marked “**RFP-2023-07 Information Technology Managed Services**” to the undersigned by the submission deadline of **14:00 Local Time, Friday May 19th, 2023**.

### **Registration of Intent to Respond**

Interested Proponents are encouraged to send an email notification to Pamela Gaudry at [pgaudry@loganlake.ca](mailto:pgaudry@loganlake.ca) providing notification of your organization's intent on submitting a proposal. Failure to do so may result in your company not receiving addenda and other correspondence related to this Invitation to Proposal.

### **Response Overview**

Proponents may amend their proposals prior to the Submission Deadline.

Proposals received after the closing date and may not be considered. The District of Logan Lake reserves the right to accept or reject any or all proposals, or to accept the proposal which it deems most favorable in the interest of the District. The lowest of any proposal will not necessarily be accepted. Prices submitted shall include all freight, documentation fees, FOB District of Logan Lake, and breakdown of taxes.

There will be no public opening for this Request for Proposal (RFP). No information will be disclosed from the time of the Bid opening to the time the contract is awarded. Once a contract has been awarded the successful Proponents name(s) will be available upon request. All Proposals become the property of the District of Logan Lake and are subject to the Freedom of Information and Privacy Legislation.

### **Type of Contract**

The selected proponent(s) will be requested to enter into direct contract negotiations to finalize an agreement with the District for the provision of the Deliverables.

## Term of Contract

The term of the agreement is to be for a period of three (3) Years. If required, and when mutually agreeable between the parties, additional services may be renewed under the same or similar terms and conditions for a successive one (1) year period (“Renewal Term”), which shall be in effect for not more than two (2) Renewal Terms. The total length of any contract resulting from this RFP shall not exceed five (5) years.

## Key dates

Issue Date of RFP	April 25th, 2023
Deadline for Questions	May 9th, 2023
Deadline for Issuing Addenda	May 11th, 2023
Submission Deadline	May 19th, 2023 14:00 local time
Rectification Period	Up to 3 business days
Anticipated Ranking of Proponents	June 9th, 2023
Contract Negotiation Period	approximately 10 business days
Anticipated Execution of Agreement	June 23rd, 2023

The RFP timetable is tentative only and may be changed by the District at any time. For greater clarity, business days means any day except for Saturday, Sunday, or any British Columbia statutory holidays.

For all inquiries contact: Pamela Gaudry [pgaudry@loganlake.ca](mailto:pgaudry@loganlake.ca)

## Section B: Instructions to Proponents

### Definitions

The following words and terms, unless the context otherwise requires, will have the meanings set out below:

“Contract” means the Agreement formed between the District of Logan Lake and the successful Proponent by method of “Contract Award Letter”.

“District” means the Corporation of the District of Logan Lake.

“District’s Representative” will mean the employee of the District designated to administer work under this contract.

“Proposal” means a proposal submitted in response to this RFP.

“Proponent” means a responder to this Request for Proposals.

“RFP” means this Request for Proposal document in its entirety, including any amendments, and/or clarifications pertaining to this RFP that may be issued prior to the Submission Deadline.

“Requirements” means all the particulars, specifications, and requirements set out in the RFP.

“Submission Deadline” means the closing date, time and place as set out on the title page of this RFP.

“Supplier” will mean the party awarded the contract by the District.

### Alternatives

The Proponent’s basic Proposal shall conform strictly to the requirements of the Request for Proposal documents and may also submit an alternative which is superior to or less costly than the basic Proposal.

### Terminology

Terminology such as, “must”, “shall”, “should”, or “may” identify the criticality of requirement. The terms “must”, and “shall”, are mandatory terms. “Should” and “may” are preferred, but less desirable and may affect the overall rating of the Proposal.

### Proposal Form and Content

Proposals should be submitted in pdf format only. **Each Section D, E, F, and G shall be submitted in individual pdf’s by the Proponent.** Unless specifically requested, the inclusion of corporate brochures and narratives is discouraged.

The legal name and address of the Proponent is to be used when signing the Proposal documents.

All costs incurred by Proponents in the preparation and presentation of their Proposal will be at their own expense.

### **Discrepancies or Omissions**

Proponents finding discrepancies or omissions in the Request for Proposal documents or having any doubts to the meaning or intent of any part thereof, should notify the RFP contact ([pgaudry@loganlake.ca](mailto:pgaudry@loganlake.ca)) by May 9th the Deadline for Questions. At which point the District may send instructions or explanations to all Proponents on record with the District.

Addenda or correspondence issued during the Request for Proposal period shall be considered part of this document and become part of the final Contract documents. Except as provided by the above paragraph; no additions or deletions from the contents of these documents will be permitted.

### **Late Proposals**

Proposals submitted after the Submission Deadline may be rejected. Onus and responsibility rest solely with the Proponent to submit their Proposal to the exact email address indicated in the RFP on or before the Submission Deadline. The District does not accept any responsibility for submissions delivered to any other email address by the Proponent or its delivery agents. Proponents are advised to make submissions well before the deadline. Proponents making submissions near the deadline do so at their own risk.

### **Acceptance and Rejections of Proposals**

The lowest price Proposal or any Proposal will not necessarily be accepted. The District reserves the right to accept a Proposal which, in its unfettered discretion, is deemed most advantageous to the District. The District also reserves the right to reject any or all Proposals, in each case without giving any notice, and without liability to any Proponent or Proponents. The District reserves the right, in its sole discretion, to negotiate with any or all Proponents.

This procurement process is not intended to create and will not create a formal, legally binding bidding process and will instead be governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation:

1. this RFP will not give rise to any Contract A–based tendering law duties or any other legal obligations arising out of any process contract or collateral contract; and
2. neither the proponent nor the District will have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the award of a contract, failure to award a contract or failure to honour a proposal submitted in response to this RFP.

Proposals that contain qualifying conditions or may otherwise fail to conform to the Instructions to Proponents may be disqualified or rejected.

The District also reserves the additional right, in its sole discretion, to waive irregularities in the Proposal form, whether of a minor or a major nature.

Notwithstanding any other provision in the RFP document, the District has in its sole discretion, the unfettered right to:

- accept any Proposal;
- reject any Proposal;
- reject all Proposals;
- accept a Proposal which is not the lowest Proposal;
- accept a Proposal that deviates from the Requirements, Particulars, Specifications or the conditions specified in this RFP;
- reject a Proposal even if it is the only Proposal received by the District;
- accept all or any part of a Proposal; and
- split the Requirements between one or more Proponents.

## **Stages of Evaluation and Negotiation**

The District will conduct the evaluation of proposals and negotiations in the following stages:

### **Stage I – Mandatory Submission Requirements**

Stage I will consist of a review to determine which proposals comply with all of the mandatory submission requirements. If a proposal fails to satisfy all of the mandatory submission requirements, the District may issue the proponent a rectification notice identifying the deficiencies and providing the proponent an opportunity to rectify the deficiencies. If the proponent fails to satisfy the mandatory submission requirements within the Rectification Period, its proposal will be rejected. The Rectification Period will begin to run from the date and time that the District issues a rectification notice to the proponent.

The mandatory submission requirements are set out in Section E RFP Particulars.

### **Stage II – Evaluation**

Stage II will consist of the following two sub-stages:

#### **Mandatory Technical Requirements**

The District will review the proposals to determine whether the mandatory technical requirements as set out in Section E RFP Particulars have been met. Questions or queries on the part of the District as to whether a proposal has met the mandatory technical requirements will be subject to the verification, clarification and supplementation process set out in Part 3.

#### **Rated Criteria**

The District will evaluate each qualified proposal on the basis of the non-price rated criteria as set out in Section E RFP Particulars.

### **Stage III – Pricing**

Stage III will consist of a scoring of the submitted pricing of each qualified proposal in accordance with the price evaluation method set out in Section F Pricing. The evaluation of price will be undertaken after the evaluation of mandatory requirements and rated criteria has been completed.

### **Stage IV – Ranking and Contract Negotiations**

#### **Ranking of Proponents**

After the completion of Stage III, all scores from Stage II and Stage III will be added together and the proponents will be ranked based on their total scores. The top-ranked

proponent will receive a written invitation to enter into direct contract negotiations to finalize the agreement with the District. In the event of a tie, the selected proponent will be the proponent selected by way of coin toss.

## **Contract Negotiation Process**

Any negotiations will be subject to the process rules contained in the General Terms and Conditions of the RFP Process (Section C) and will not constitute a legally binding offer to enter into a contract on the part of the District or the proponent, and there will be no legally binding relationship created with any proponent prior to the execution of a written agreement.

Negotiations may include requests by the District for supplementary information from the Proponent to verify, clarify, or supplement the information provided in its proposal or to confirm the conclusions reached in the evaluation, and may include requests by the District for improved pricing or performance terms from the proponent.

The selected Proponent will be requested to enter into direct contract negotiations to finalize an agreement with the District for the provision of the Deliverables. It is the District's intention to enter into an agreement with only one (1) legal entity, however, the District reserves the right to select a roster of three (3) organizations for the services and goods highlighted in this RFP.

## **Purchase Approval**

Prior to the award of a contract all services to be purchased may require approval by The District of Logan Lake Municipal Council.

## **Qualifications and Experience**

All Proponents should furnish satisfactory evidence as required to demonstrate that they have the qualifications and sufficiently trained and experienced personnel to complete the requirements of the contract to the satisfaction of the District, as per Section E RFP Particulars. The District reserves the right to make the final decision, as it sees fit, as to whether the Proponent(s) that respond to this RFP can satisfy this requirement.

## **Prices**

All prices are to be in Canadian currency excluding taxes. Specify all pricing information as a separate pdf as per Section F Pricing. In cases of a discrepancy found between the unit price and the total amount, the unit price shall be considered as being the intention of the Proponent.

## **References**

The District requests that Proponents provide with their Proposals a list of companies with which they are currently or have recently offered services which are identical to or like that which are being proposed in this Request for Proposals, as per Section G Training and References. A separate pdf document should be sent for each section Training and References, as per Section G.

## **Time Period for Negotiations**

The District intends to conclude negotiations and finalize the agreement with the top-ranked proponent during the Contract Negotiation Period, commencing from the date the District invites the top-ranked proponent to enter negotiations. A proponent invited to enter into direct contract negotiations should therefore be prepared to satisfy the pre-conditions of award listed in Section



E RFP Particulars, provide requested information in a timely fashion and conduct its negotiations expeditiously.

### **Failure to Enter into Agreement**

If the pre-conditions of award listed in Section E RFP Particulars are not satisfied or if the parties cannot conclude negotiations and finalize the agreement for the Deliverables within the Contract Negotiation Period, the District may discontinue negotiations with the top-ranked proponent and may invite the next-best-ranked proponent to enter into negotiations. This process will continue until an agreement is finalized, until there are no more proponents remaining that are eligible for negotiations, or until the District elects to cancel the RFP process.

### **Notification of Negotiation Status**

Other proponents that may become eligible for contract negotiations may be notified at the commencement of the negotiation process with the top-ranked proponent.

### **Past Performance**

In the evaluation process, the District may consider the proponent's past performance or conduct on previous contracts with the District or other institutions.

### **Conflict of Interest**

Proponents shall disclose any potential conflicts of interest and existing business relationships they may have with the District. If requested by the District, Proponents must provide all pertinent information regarding ownership of their company within forty-eight (48) hours of the District's request.

### **Solicitation of Council Members**

Proponents and their agents will not contact any member of the District Council or District staff with respect to this RFP at any time prior to the award of a contract or the termination of this RFP, and the District may reject the Proposal of any Proponent that makes any such contact.

### **Confidentiality**

All Proposals become the property of the District and will not be returned to the Proponent. All Proposals will be held in confidence by the District unless otherwise required by law. Proponents should be aware the District is a "public body" defined by, and subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

**End Section  
Instructions to Proponents**

## **Section C: General Terms and Conditions**

### **General Terms and Conditions**

The general terms and conditions shall be part of any Contract awarded because of this RFP. Submission of a Proposal in response to this RFP indicates acceptance of all the terms that follow and that are included in any amendment and or addenda issued by the District. Provisions in Proposals that contradict any of the terms of this RFP will be as if not written and do not exist.

### **Breach of Contract**

If the contracted Supplier breaches any terms or conditions of the Contract, or becomes insolvent, enters voluntary or involuntary bankruptcy or receivership proceedings or makes an assignment for the benefit of creditors, the District shall have the right (without limiting any other rights or remedies which it may have hereunder or by operation of both) to terminate any Purchase by written notice to the Supplier, whereupon the District shall be relieved of all further obligations hereunder except the obligation to pay the reasonable value, as determined by the District, of the Supplier's prior performance (not exceeding the total value of the Contract Award) and the Supplier shall be liable to the District for all costs incurred by the District in completing or procuring the completion of performance in excess of the total value of the Contract Award Letter. The District's right to require strict performance of any obligation hereunder shall not be affected by any previous waiver, forbearance or course of dealing.

### **Cancellation of Contract**

If at any time during the contract the Supplier fails to meet the requirements and/or expectations of the District, the remainder of the contract may be cancelled by the District immediately upon notice to the Supplier. Either party to this contract may cancel the contract upon thirty (30) days' written notice to the other party.

### **Assignment or Subletting of Contract**

The Supplier shall keep the work under his personal control, and shall not, without the consent in writing of the District, assign or sub-let this contract or any part thereof. If the District should consent to any such assignment or sub-letting of this contract or part thereof the Supplier shall by reason thereof be in no way relieved from their responsibility for the fulfillment of the work but shall continue to be responsible for the same in the same manner as if the said work had been performed by the Supplier themselves.

### **Supplier's Expense**

The Supplier shall at his own expense, unless it is expressly stipulated to the contrary, provide, supply, observe, perform and do everything which, in the opinion of the District, may be required for the setting out, the execution and the completion of the work and the fulfilling of the contract.

### **Time is of the Essence**

For all requests made by the District pursuant to the Supplier, time is of the essence.

## **Indemnity**

The Supplier shall indemnify, protect, and save harmless the District, its officers, agents, servants, and employees from and against all actions, claims, demands of any kind, description, and nature whatsoever arising out of, or in any way connected with the fulfillment of its obligation in accordance with the RFP; and all such actions, causes of actions, claims and demands recoverable by any third party from the District of the property of the District, shall be paid by the Supplier. If the District pays, or is required to pay, any damages, costs, or fees on account of the actions, claims and demands herein recited, or if the property of the District shall be charged in any way as a result of the aforesaid actions, causes of actions, claims for demands, then the District shall be entitled to recover from the supplier all such damages, costs, fees, or other charges together with any costs or expenses incurred in so doing from the Supplier.

## **Deviation from Contract**

The Supplier shall not make any alterations or variation in, or addition to, or deviation or omission from the terms of the contract without the written consent of the District.

## **Invoices and Payment**

The District will make payment for services and equipment only after the equipment ordered has been received, inspected, accepted, and has been deemed suitable to be placed into service by the District.

The Supplier shall send invoices to **ap@loganlake.ca with attention to Jean Finlay, Accounts Payable – Re: IT Services.**

The name of the District's Representative responsible should appear on all invoices sent to the District.

Payment by the District shall then be made within the standard Net 30 days after the delivery to the District's Finance Department of properly prepared invoices, unless the payment terms offered by the supplier are deemed an advantage to the District, or the District has deemed a portion of payment is to be held back pending satisfactory completion of the contract.

## **Applicable Law**

Each party's performance hereunder shall comply with all applicable laws of British Columbia, Canada. This contract shall be governed by and interpreted in accordance with the laws of the Province of British Columbia. If any part, term, or provision of this Agreement shall be held void, illegal, unenforceable, or in conflict with any applicable law, the validity of the remaining portion of provision shall not be affected hereby.

## **Insurance, and Health and Safety**

The Proponent warrants and agrees that it will comply with, and ensure that any subcontractors comply with, all applicable occupational health and safety laws, regulations and standards in relation to the performance of the Proponent's obligations under this RFP. The Proponent shall provide the District with evidence of the Proponent's compliance with this section upon request by the District.

The Proponent must keep the following current and provide a copy to the District annually:

- A. WorkSafeBC Clearance Letter,
- B. Insurance acceptable to the District, which may include commercial general liability insurance on an occurrence basis for third party bodily injury, personal injury and property damage, to an inclusive limit of not less than \$5,000,000 per occurrence and including products and completed operations liability. The policy is to include the following:
  - a. the District as an additional named insured with respect to liability arising in the course of performance of the Proponent's obligations under, or otherwise in connection with, the Contract
  - b. contractual liability coverage
  - c. cross-liability and severability of interests clause
  - d. 30 day written notice of cancellation, termination or material change

**End Section  
General Terms**

## Section D: Submission Form

### 1. Proponent Information

<b>Please fill out the following form, naming one person to be the proponent's contact for the RFP process and for any clarifications or communication that might be necessary.</b>	
Full Legal Name of Proponent:	
Any Other Relevant Name under which Proponent Carries on Business:	
Street Address:	
District, Province/State:	
Postal Code:	
Phone Number:	
Company Website (if any):	
Proponent Contact Name and Title:	
Proponent Contact Phone:	
Proponent Contact Email:	

### 2. Acknowledgment of Non-Binding Procurement Process

The proponent acknowledges that the RFP process will be governed by the terms and conditions of the RFP, and that, among other things, such terms and conditions confirm that this procurement process does not constitute a formal, legally binding bidding process (and for greater certainty, does not give rise to a Contract A bidding process contract), and that no legal relationship or obligation regarding the procurement of any good or service will be created between the District and the Proponent unless and until the District and the Proponent execute a written agreement for the Deliverables.

### 3. Ability to Provide Deliverables

The proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required. The proponent represents and warrants its ability to provide the Deliverables in accordance with the requirements of the RFP for the rates set out in its proposal.

### 4. Non-Binding Pricing

The proponent has submitted its pricing in accordance with the instructions in the RFP and in Pricing (Section F) in particular. The proponent confirms that the pricing information provided is accurate. The proponent acknowledges that any inaccurate, misleading, or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its proposal or its eligibility for future work.

### 5. Addenda

The proponent is deemed to have read and taken into account all addenda issued by the District prior to the Deadline for Issuing Addenda.

**6. No Prohibited Conduct**

The proponent declares that it has not engaged in any conduct prohibited by this RFP, as defined in Section B Instructions to Proponents Definitions, and Section C General Terms and Conditions.

**7. Sections**

The proponent is deemed to have read and taken into account all sections (A through G) attached to this RFP.

**8. Conflict of Interest**

The proponent must declare all potential Conflicts of Interest, as defined in Section B Instructions to Proponents of this RFP. This includes disclosing the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other District) who:

- a. have family members currently employed by the District,
- b. participated in the preparation of the proposal; AND/OR
- c. were employees of the District within twelve (12) months prior to the Submission Deadline.

If the box below is left blank, the proponent will be deemed to declare that (a) there was no Conflict of Interest in preparing its proposal; and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

Otherwise, if the statement below applies, check the box.

- The proponent declares that there is an actual or potential Conflict of Interest relating to the preparation of its proposal, and/or the proponent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

If the proponent declares an actual or potential Conflict of Interest by marking the box above, the proponent must set out below details of the actual or potential Conflict of Interest:

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**9. Disclosure of Information**

The proponent hereby agrees that any information provided in this proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The proponent hereby consents to the disclosure, on a confidential basis, of this proposal by the District to the advisers retained by the District to advise or assist with the RFP process, including with respect to the evaluation of this proposal.

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Signature of Proponent Representative

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Name of Proponent Representative

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Date

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Title of Proponent Representative

I have the authority to bind the proponent

## Section E: RFP Particulars

### Scope of Work

The District of Logan Lake is looking for expertise and services related to Information Technology Managed Services.

Specific initiatives or services include, but are not limited to, the following:

- Server, Workstation, and Network Management - includes a combination of server and network monitoring to enable proactive responses, server and network device firmware updates to maintain and improve current security levels, and server health checks to verify overall IT environment health. More specifically:
  - Monitoring and Alerting
  - Windows Patch Management
  - Backup Management
  - Security Management
  - Firmware Updates
  - Quarterly Maintenance
  - Password Management
- In addition, the District is looking for IT Managed Services support with various aspects of its operations, including, but not limited to, the following:
  - Software and Applications
  - General IT Security / Privacy
  - Data / Information Management
  - IT Operations
  - Infrastructure Services

The successful Proponent will provide the expertise required and is able to implement themselves or in conjunction with already established partnerships and internal staff.

A dedicated, experienced Account Manager will be supplied by the Proponent, be readily available to assist with current and upcoming initiatives, be the key contact for all work being performed by the Proponent and their partners and be the Project Manager for initiatives the Proponent is involved in. In all cases, training and knowledge transfer to internal staff is required to ensure they are proficient and able to support and maintain systems, processes and technologies that are implemented. The District prefers a key contact (“Account Manager”) to manage the District and be responsible for coordinating all activities described within this RFP. The Account Manager will operate as an extension of the Districts internal team. The Account Manager shall be required to respond to questions and be available to attend in-person meetings on short notice.

The District expects the successful Proponent to collaborate with the District ensuring business practices, business environment and major stakeholder objectives are understood throughout the term of the business relationship.

## **Services Budget**

The requirement for IT Managed Services, including consulting, tools, fees and materials, is estimated to be between \$20,000 to \$50,000 per annum, based on recent contracts for similar work. The Proponent is advised that there is no commitment to expend all, or any amount of the contract as the work may be variable depending on approved projects and funding availability.

Work and/or projects may be assigned to other external contracts and the District does not guarantee the Proponent will receive this work.

## **Work Requirements**

### **Hours of Work:**

The work is to be done during regular business hours (8:30AM – 4:00PM) Monday to Friday. Mutually agreed upon variance to above noted hours may be negotiated and would require prior approval by the District.

The District may, in its sole discretion, require security clearances in a form satisfactory to the District from the Proponent (and the Proponent's sub-Proponent's), if any, before entering into or during a contract. Any costs associated with obtaining such security clearances will be borne by the Proponent at no cost to the District

## **Requirements and Qualifications**

Proponents are required to have a minimum of five years of specialized experience in managing

- Server, Workstation, and Network Management, including, but not limited to:
  - Monitoring and Alerting
  - Windows Patch Management
  - Backup Management
  - Security Management
  - Firmware Updates
  - Quarterly Maintenance
  - Password Management

## **Mandatory Submission Requirements**

### **Submission Form (Section D)**

Each proposal must include a Submission Form (Section D) completed and signed by an authorized representative of the proponent.

### **Pricing (Section F)**

Each proposal must include pricing information that complies with the instructions contained in Pricing (Section F).

### **Mandatory Technical Requirements**

n/a



## Rated Criteria

The following sections set out the categories, weightings and descriptions of the rated criteria for Stage II and III of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the subsequent stage of the evaluation process.

### Initial Evaluation Criteria

The following categories, weightings and descriptions will be used in the initial evaluation of rated criteria during Stage II of the evaluation process (Evaluations), described in Section B Instructions to Proponents of this RFP. These criteria apply to initial proposals by all proponents.

Parameter	% of Evaluation	Minimum Threshold
Corporate Expertise	15%	n/a
Technical Requirements and Abilities	35%	n/a
Pricing	30%	n/a
Training	10%	n/a
References	10%	n/a

## Technical Questionnaire

Proponents should include a table of contents and address questions in order. This section details the minimum experience and qualification for this bid.

### Corporate Expertise (15%)

Provide a brief overview of your company and any additional company information you wish to provide. Indicate:

- the years of experience relevant to the scope of this RFP,
- corporate strategic plan,
- Number of employees and the average length of experience,
- certifications and memberships, and
- any industry awards and recognitions.

Briefly describe your experience working with Canadian municipalities, Canadian public sector entities, Regional Districts and/or BC Crown corporations.

Describe your firm's commitment to making resources available throughout the engagement.

It is critical to the District that written and verbal reports are received on a timely basis and that deadlines are regularly met. Describe your ability to meet deadlines, schedules and commitments as agreed to with the client.

Describe your ability and approach to handling changes in direction, emergencies and reprioritization needs that are inherent to providing these services.

Describe how you propose to ensure continuous and timely communication with the District on key issues, engagement milestones, estimated fees, etc.

### **Technical Requirements & Abilities (35%)**

For the items below, describe your experience and expertise in each. In addition, provide details on any relevant or similar engagements with other clients.

1. **Server, Workstation, and Network Management** - this should include, but is not limited to:
  - a. Monitoring and Alerting
  - b. Windows Patch Management
  - c. Backup Management
  - d. Security Management
  - e. Firmware Updates
  - f. Quarterly Maintenance
  - g. Password Management
  
2. **Software and Applications** - For general software and applications utilized by the District, provide details related to the following areas:
  - a. How the Proponent may support the District with 3rd party applications, including accounting software, asset management, access management etc. As an example, the District currently utilizes AMIGA accounting software hosted on premises.
  - b. The District has a short term goal of live streaming all council meetings. This may require the Proponent supporting any Audio Visual solution.
  
3. **Documents and Records Management** - the District has recently started utilizing Microsoft 365, however, the document management system is currently a file server hosted on premises. Provide details related to the following areas:
  - a. Troubleshooting issues related to the current file server, including utilizing a VPN to access files and folders.
  - b. Support with migrating from the current file server to M365 OneDrive and SharePoint.
  - c. Training related to M365 OneDrive and SharePoint.
  
4. **Information Technology Operations** - the Proponent should detail how it intends to support the District with the following areas:
  - a. Providing a clearly defined trouble ticketing process, offering clarity on who should be responsible for responding to particular IT issues as well as response times. As an example, the District currently experiences issues related to photocopiers and network connectivity.
  - b. Communication, responsiveness and project management in relation to IT initiatives.
  - c. Knowledge transfer when it comes to IT best practices.
  - d. The District would like to explore solutions for phone maintenance, problem solving, plan maintenance and change over for cell phones. Please indicate any experience with supporting the deployment of an organization wide cell phone plan.

5. **Security and Privacy** - the District is looking for support and guidance in the following areas:
  - a. Password management for the District, including creating guidelines on best practices.
  - b. Implementation and rollout of Multi-Factor Authentication where possible.
  - c. Security Awareness Training including modules for education throughout the District employees, as well as phishing simulation. Please list any 3rd party applications you may want to implement for this.
  - d. The use and management of 3rd party antivirus software. Currently the District utilizes Trend Micro Antivirus, but is open to the use and rollout of other antivirus applications.
  - e. Experience with Privacy Impact Assessments related to municipalities would be considered an asset.
  
6. **Infrastructure Services and Backups** - the Proponent should highlight how it could support the District with the following areas:
  - a. Backups are undertaken regularly at the District, but the process is onerous and requires backup tapes being stored offsite. Outline how this process can be adjusted to comply with modern practices.
  - b. The District currently lacks a comprehensive IT plan for addressing any potential natural disasters, similar to the wildfires that occurred in 2021. The Proponent should detail what experience it has in Business Continuity, Disaster Recovery, and Incident Response Plans.
  - c. What policies should the District look at when managing 3rd party applications, to ensure backups are being taken effectively and the District is protected from 3rd party vendor cybersecurity breaches.
  
7. **Strategic Support and Guidance** - The District is looking for a technology partner to support its strategic growth. The Proponent should detail how it could support the District with the following items:
  - a. Providing direction and guidance on best practices regarding Information and Communication Technology.
  - b. The District currently suffers from poor connectivity within the region. What experience does the Proponent have in providing guidance on connectivity solutions?
  - c. Internal communication for the District is fragmented across Teams, deskphones, cellphones, emails etc. Provide an overview of your experience on implementing a Unified Communication Plan to help resolve this issue.

**End Section  
RFP Particulars**

## **Section F: Pricing**

### **Pricing (30%)**

#### **Instructions on How to Provide Pricing**

Proponents should minimally provide the information requested in this Section F Pricing.

Proponents are to completely describe all prices (gst excluded), including person hour estimates where applicable. Furthermore, provide an estimate and itemized cost allowance for any subcontractor services that may be requested. Provide a clear itemized listing of services that are included in the proposal and/or base price (if applicable).

In addition, provide a separate listing of all available value added options with pricing for each option presented separately, and all in Canadian dollars. Provide any/all rates offered to the District during a 3 year contract.

#### **Evaluation of Pricing**

Pricing is worth 30% of the total score and will be quantified using the following pricing formula:

Lowest priced Submission / Proposed price x Weight = Score. Should any price be at no cost, the District will apply a value of 0.001 for any evaluation calculations.

#### **Required Pricing Information**

The Proponent should provide pricing based on the following services and more specifically on the delivery of monthly services for Server, Workstation, and Network Management:

##### **Pricing Specifications**

- Provide a lump sum fee where possible.
- Provide the fee in a table that clearly identifies fees and disbursements for all phases of the projects (example initiation, onboarding, implementation, training, hand off).
- Provide a clear itemized listing of services that are included and or available in this proposal.
- Additionally, provide hourly charge out rates for all key personnel and optional personnel.
- Identify and describe all disbursements and expenses.
- Provide a separate listing of all available value added options with pricing for each option presented separately.
- Provide a clear billing structure for all services and solutions offered, as well as expected billing cycles.

##### **Server, Workstation, and Network Management**

The District is requesting pricing for the following IT environment:

- The District currently has 25 employees
- In December 2022, the District started provisioning M365 licenses, and acquired 22 M365 Business Standard licenses.
- Migration and onboarding of IT management, Microsoft licensing, user management, off-site back-up, network infrastructure and supporting services. For clarity this includes

onboarding services related to workstations and laptops, M365 licenses, network management.

- Ongoing management of the Districts Microsoft licensing, user management, off-site back-up, network infrastructure and supporting services.
- For the purposes of pricing, the District currently utilizes a 2TB hard drive for weekly backups.

### **Out of Scope**

The Proponent should detail any Out of Scope services that would not be considered standard IT management services. Examples of out-of-scope work might include out of band server or network firmware updates, or hardware procurement etc.

### **Scenarios**

In addition to the pricing information requested previously, the Proponent should provide pricing based on the following scenarios.

### **Scenario 1 – Medium Term Project**

#### **Context**

The District and the successful Proponent have agreed on a Project that requires 100 hours of effort over a 4 month period. All resources will be provided by your organization and no external partners are required.

#### **Labour for Deliverables**

Based on consultation between our two parties regarding this project, we have agreed on the following resources, hours required onsite at the District and hours that can be worked remotely.

<b>Resource</b>	<b>Onsite Hours</b>	<b>Remote Hours</b>
Account Manager	5	10
Project Manager	15	20
IT Consultant	5	20
IT Systems Administrator	5	20

For each resource, identify hourly and overall costs for the onsite and remote hours. In addition to the time and materials costs, provide a fixed price cost for this scenario. Identify the typical percentage amount and dollar amount of contingency required for an engagement of this size and duration.

#### **Travel**

Account for your estimated travel supporting above deliverables - include the following, estimated in aggregate, based on the following typical expenses categories:

- Estimated travel expenses (based on where you're most likely to travel from, specify location)

- Estimated ground transportation expenses (rental / taxi / transit)
- Estimated accommodation, meal and incidental expenses
- Estimated labour costs for travel (if considered billable hours)
- If required, specify contingency for travel-only (% and \$ amount included)

## Scenario 2 – Emergency Engagement

### Context

The District has discovered an emergency that requires technical skills on short notice. The work will take 15 hours and needs to start within 24 hours. All resources will be provided by your organization and no external partners are required.

### Labour for Deliverables

Based on consultation between our two parties regarding this work, we have agreed on the following resources, hours required onsite at the District and hours that can be worked remotely.

Resource	Onsite Hours	Remote Hours
Account Manager	0	5
Project Manager	0	0
IT Consultant	0	0
IT Systems Administrator	0	10

For each resource, identify hourly and overall costs for the onsite and remote hours. In addition to the time and materials costs, provide a fixed price cost for this scenario.

### Travel

Account for your estimated travel supporting above deliverables - include the following, estimated in aggregate, based on the following typical expenses categories:

- Estimated travel expenses (based on where you're most likely to travel from, specify location)
- Estimated ground transportation expenses (rental / taxi / transit)
- Estimated accommodation, meal and incidental expenses
- Estimated labour costs for travel (if considered billable hours)
- If required, specify contingency for travel-only (% and \$ amount included)

## **Section G: Training and References**

The proponent is requested to provide a separate pdf for each of the following evaluation criteria.

### **Training (10%)**

In all cases, training and knowledge transfer to internal staff is required to ensure District staff are proficient and able to support and maintain changes that are made. The District expects the successful Proponent has a defined knowledge sharing practice within its service delivery, ensuring knowledge is retained by the client.

This is to mitigate the risk of concentrating business and technical knowledge to one point of contact.

1. Describe how you ensure knowledge base retention within your account management team, SMEs and partners; and how the knowledge is transferred to your clients.
2. Provide a relevant example of when you've done this, what the outcome was and how effective the client's team is now.

### **References (10%)**

Provide at least 3 references that your company has provided similar services. List:

- Customer Name and Title
- Contact position, phone number and email address
- Project(s) date (start, completion, ongoing)
- Specific role of your company in the Project(s)
- Description of Scope/Project(s)
- Relevance in terms of similarity to the District's requirements stated in this RFP

The preference is for municipal and/or public sector references who operate similar to the District; however, proponents cannot submit references from the Districts IT Division. The District reserves the right to obtain their own references and take these into consideration in the review of submissions.