Request for Proposal – Issued July 7, 2021
Information Technology Managed Services
Village of Waunakee

Proposal Requested
The Village of Waunakee is publishing a request for proposal for Information Technology Managed Services. These services would be provided to all of the Village departments on a weekly or as needed basis. The desired service agreement is for a 3-year term (2022-2024) with an option for renewal.

Project Description
The Village of Waunakee contracts out all of its Information Technology maintenance and technical services. The Finance Director is responsible for oversight of the contract. The contracted IT Technician(s) will be responsible for working with Village departments to perform tasks as needed for operations. Village Departments requiring these services include: Police, Public Works and Engineering, Community Development, Clerk, Finance, Community Services, Senior Services, Municipal Court, and Administration. The Village has roughly 84 FTE positions and a wide range of IT equipment ranging from servers, computers, printers, network access points, video cameras, door security, monitors, microphones, projectors, telephones, etc. The Village utilizes a number of vendors to perform specific maintenance and updates on equipment but may require the assistance of an IT services contractor to coordinate these maintenance activities. Software and applications utilized by Village of Waunakee staff includes (but not limited to): Microsoft Office suite, Adobe suite, OnBase Records Management, OnBase Agenda Management, Caselle Connect, Badger Tracs, GCS, Quick Clerk, Pro Phoenix and Axon Body Cameras. The Village of Waunakee current IT equipment includes: 78 PC's, 14 laptops, 33 surface devices, and 9 servers.

Estimated Timeline
Action items in the estimated timeline are at the discretion of the project manager and are meant to provide a clear understanding of the proposal steps; the schedule is subject to change.

Action Step	**Date**
RFP Issued	July 7, 2021
Deadline to Submit Questions*	July 21, 2021
Answers to Questions Provided on Village Website	July 26, 2021
Proposals Due	August 2, 2021
Interviews (if needed) and Review of Proposals	August 9-20, 2021
Make Recommendation on Contractor	August 25, 2021
Finalize Service Agreement with Contractor	August 30, 2021
Village Board Considers Service Agreement	September 7, 2021
Contract Implementation	January 1, 2022

**Requests for additional information and questions should be addressed in writing and directed to Caitlin Stene, Deputy Administrator, (cstene@waunakee.com). Questions will not be handled after 4:00 pm on July 21, 2021.*

Project Scope

As part of this RFP, the following services are the current priority items for the Village of Waunakee:

Task 1 – Perform general maintenance IT services

A. Perform services required by the Village, which includes but not limited to: server integration, network services, wireless, network security, backup and recovering, consulting, telephone system support, mobility solutions, VOIP and IP network assessment, implementation services and support, structured cabling, video surveillance, facility services and paging.
B. Serve as consultative interface for the customer in dealing with third parties such as application providers, software applications, internet service providers, and telecommunications circuit providers.
C. Assist Deputy Village Administrator in annual cyber security training initiative for Village employees.
D. Provide monthly report summarizing status of current projects and tasks.
E. Provide telephone and/or remote based support via software agent, preferably a helpdesk with established hours of operation of a minimum of Monday-Friday, 7 am to 4 pm.
F. Communicate with Finance Director and department heads (if needed) with feedback on regular IT tasks and upcoming projects/initiatives.
G. Assist with monitoring of compliance with Village IT policies (available upon request).
H. Document all procedures and operations related to IT general maintenance and provide access to documented procedures to Village staff.

Task 2 – Managing Annual IT Capital Expenditures

A. Work with Department Heads for IT needs development and project planning.
B. Update and manage the annual IT asset list outlining all IT related expenses.
C. Generate memo/proposal communicating all proposed IT project for the upcoming year with the Finance Director and appropriate department head(s) (if needed) by August of each year.
D. Review the proposed annual budget to assure all IT approved projects are included.
E. Present best IT practices in the industry when proposing budget and capital expenses to proactively address IT related security and performance concerns.

Task 3 – Proactive Environment Management, Monitoring, and Administration

A. Software agent based 24x7x365 PC monitoring of: PC/workstations, servers, network, firewall and overall IT environment.
B. Preventative maintenance and security of software utilized by the Village (windows, adobe, java, etc.).
C. Malware and anti-virus software protection monitoring and management.
D. Monitoring and management of system backup jobs, server usage, and firewalls.
E. Review of firewall and VPN log files.
F. Firewall configuration changes and updates including firewall software updates.
G. Configuration of secured VPN access for remote users and to outside systems.
H. Segregation of networks and systems required for enhanced security.
I. Ensuring appropriate security protocols and access methods for all wireless access points.
J. Configuration and maintenance of network switches and other network infrastructure.
K. Installation, configuration, and management of server software.
L. Adds/moves/changes to server domain users.
M. Active/retired asset audit and reporting.
N. License compliance monitoring and license management
O. Automated weekly and monthly system status and performance reporting.

Proposal Content

The proposal should not exceed ten (10) single-sided pages and should address the following:

1. Transmittal Information
    a. Firm's name, address, telephone number and contact person
    b. Firm's confirmation of understanding of the project and commitment to provide appropriate personnel, equipment, and facilities to perform the scope of services as defined in this document.
2. Approach
    a. Provide a description of the anticipated services.
    b. Provide a project work plan for a migration to your organization, including: key initiatives, timing, and informational resource requirements from the Village of Waunakee.
    c. Outline your proposed staffing level and activities.
    d. Provide description on how to manage weekly workload depending on projects and troubleshooting issues.
    e. Summarize how the Village can contact you after hours in emergency situations.
3. Personnel Experience. For each project team member please submit a BRIEF description of the following:
    a. Name
    b. Proposed responsibilities
    c. Professional registrations
    d. Description of related past experience of a similar capacity on projects of comparable size and/or scope – include experiences with listed software and applications in project background as well as understanding of CJIS compliance standards.
4. Cost
    a. Please complete the proposal cost sheet (attached, please note that the cost sheet does not count towards the 10-page proposal response maximum).
    b. Please note there will be no reimbursement for travel time, meals, or milage; these incidental costs should be included in the hourly rates. Only document reproduction costs will be reimbursable.
    c. Describe the circumstances under which you would propose to modify the fees, and how you would communicate such a potential modification to the Village of Waunakee.
    d. If appropriate, include a proposed billing cycle/schedule.
    e. Please provide information regarding the hourly rate for services that fall outside the scope of this RFP.
5. Contract
    a. Please attach a copy of your standard contract for these types of services in the email submitting the proposal.
6. Insurance
    a. The proposal must include either a description of the firm's insurance or a certificate of insurance outlining the firm's insurance policies which evidence compliance with the requirements noted in the *Terms and Conditions* section of this RFP.
7. Examples of Work
    a. Please provide up to three different examples of programs or services you have performed for other municipalities or public agencies. The work should demonstrate a high quality of service.
8. References
    a. Please provide references of current or previous clients you have worked with in the past.
    b. It is highly recommended to include at least one municipality as a reference.

Terms and Conditions

Payment Terms

All invoices for services will be processed within 30 days, pending verification and the receipt of any required documentation of services provided in accordance with the terms of the agreement. If approved service agreement identifies services to be paid hourly, invoice must specify deliverable(s) completed and performed as well as any additional costs for equipment or materials. Invoice will be paid upon completion of service unless specified differently in the service agreement. If approved service agreement identifies an annual flat fee for services, the Village asks to receive monthly invoices based on equal installments over contract period.

Insurance

The successful firm shall agree that it will, at all times during the term of the agreement, keep in force and effect insurance policies required by the contract, issued by a company or companies authorized to do business in the State of Wisconsin and satisfactory to the Village. Such insurance shall be primary. Prior to execution of the written contract, the successful firm shall furnish the Village with a Certificate of Insurance listing the Village as an additional insured and upon request, certified copies of the required insurance policies. The Certificate shall reference the contract and provide for thirty (30) days advance notice of cancellation or nonrenewal during the term of the agreement. Failure to submit an insurance certificate, as required, can make the contract voidable at the Village's discretion.

Additionally, the Firm shall not allow any subcontractor to commence work until the aforementioned documents, where applicable, have been obtained from the subcontractor and approved by Village of Waunakee.

Nondiscrimination

In connection with the performance of work under this agreement, the Firm agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, marital status, sexual orientation, sex, disability, national origin, or ancestry. This provision must be included in all subcontracts.

Assignment or Subcontract

The contract may not be assigned or subcontracted by the firm without the written consent of the Village. If all or a portion on the contract work is proposed to assigned or subcontracted, the name of the individual(s) to complete the work, address and firm proposed shall be submitted within the scope of the proposal.

Independent Contractor Status

The firm agrees that it is an independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

Amendments to Contract

This contract may be modified only by written amendment to the contract, signed by both parties.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same or any other term. The consent or approval given by any party with respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Indemnification and Defense of Suits
The firm agrees to indemnify, hold harmless, and defend the Village, its officers, agents and employees from any and all liability including claims, demands, damages, actions or causes of action, together with any and all losses, costs, or expense, including attorney fees, where such liability is founded upon or grows out of the acts, errors, or omissions of the firm, its employees, agents or subcontractors.

Contract Period
The term of this contract will be 2022-2024 with an option to extend for additional twelve-month periods, as needed.

Termination of Contract
To be defined in the contract document.

Agreement of Non-Disclosure
This document is considered to be proprietary and shall not be disclosed to any other party. It is designated, developed, and submitted to potential partners of the Village of Waunakee solely for the benefit of the Village.

Professional Services Contract
If your proposal is accepted and a contract is issued, then this Request for Proposal and all documents attached hereto including any amendments, the firm's technical and price proposals, and any other written offers/clarifications made by the firm and accepted by the Village, will be incorporated into a contract between the Village and the firm, it shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto.

The submission of a proposal shall be considered as a representation that the firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal and Local regulations that affect, or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon award by the Village Board, execution of the contract by the proper Village officials, and delivery of the fully-executed contract to the firm. Acceptance may be revoked at any time prior to delivery of the fully-executed contract to the successful firm. The contract may be amended only by written agreement between the firm and the Village of Waunakee.

Selection Criteria
Village Staff will consider the following in evaluation of the proposals:

1. Past record of performance of the vendor and team on similar projects (i.e. references, work examples).
2. Quality and content of the written proposal.
3. Experience and technical competence of the vendor and project team assigned to the project.
4. The vendor's approach to the project, including the Village's confidence in the vendor's ability to satisfactorily perform the work.
5. Cost.

Instructions to Firms

Submittal Instructions

1. Please provide (1) digital copy of the proposal via email to:
   Caitlin Stene, Deputy Village Administrator
   Email Address: cstene@waunakee.com
   Subject line of the email: IT Managed Services Proposal
   Deadline: Monday, August 2, 2021 by 4:00 p.m. CST

2. Proposals will be accepted on or before the deadline identified above. Proposals received after that date and time will be rejected. Proposals will not be opened publicly.
3. Questions regarding this RFP should only be directed to staff member identified above. Contact with elected officials, committee members and other staff members is grounds for disqualification.

This RFP does not commit the Village to award a contract, to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or supplies. The Village reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this RFP, if it is in the best interest of the Village of Waunakee to do so.

Amendments

Amendment of proposals may be done as follows:

By Village: Proposals may be amended by the Village in response to need for clarification, specifications and/or requirements changes, new opening date, etc. Copies of the amendment will be mailed to prospective vendors.

By Firm: Proposals may only be amended after receipt by the Village by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the opening date unless requested by the Village.

Proposals may be withdrawn only in total, and only by a written request to the Village prior to the time and date scheduled for opening of proposals.

RFP Administration

Primary contact for RFP administration of this proposal:

Caitlin Stene, Deputy Village Administrator
Phone Number: 608-850-2827
Email address: cstene@waunakee.com

In the absence of the primary contact, the secondary contact for RFP administration is:

Renee Meinholz, Finance Director
Phone Number: 608-850-6622
Email address: rmeinholz@waunakee.com

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Information Technology General Maintenance and Technician Services
Village of Waunakee

Attachment A – Cost Sheet

Please provide the following details to inform the Village of estimated costs for each contracted year. Tasks are outlined in detail on page 2 of the RFP document. Feel free to create your own cost sheet for ease of completion as long as it follows the format included below. If there are any costs that are not applicable, please include NA in the appropriate field.

Contract Year: 2022

Task	Estimated Annual Hours	Hourly Rate	2022 Total
Task 1 – Perform General Maintenance IT Services		$	$
Task 2 – Managing Annual IT Capital Expenditures		$	$
Task 3 – Proactive Environment Management, Monitoring, and Administration		$	$
Total, all-inclusive maximum price:			***$***

Contract Year: 2023

Task	Estimated Annual Hours	Hourly Rate	2023 Total
Task 1 – Perform General Maintenance IT Services		$	$
Task 2 – Managing Annual IT Capital Expenditures		$	$
Task 3 – Proactive Environment Management, Monitoring, and Administration		$	$
Total, all-inclusive maximum price:			***$***

Contract Year: 2024

Task	Estimated Annual Hours	Hourly Rate	2024 Total
Task 1 – Perform General Maintenance IT Services		$	$
Task 2 – Managing Annual IT Capital Expenditures		$	$
Task 3 – Proactive Environment Management, Monitoring, and Administration		$	$
Total, all-inclusive maximum price:			***$***

One-Time Expenses: if you anticipate any one-time expenses related to contract implementation, please describe the expenses below.

Task	Amount	Description
Total, all-inclusive maximum price for one-time expenses		***$***

Other Items:

1. Describe the circumstances under which you would propose to modify the fees, and how you would communicate such a potential modification to the Village of Waunakee:

2. If appropriate, include a proposed billing cycle/schedule.

3. Please provide information regarding the hourly rate for services that fall outside the scope of this RFP.

Personnel Title	2022 Hourly Rate	2023 Hourly Rate	2024 Hourly Rate
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$