

Request for Proposal

Information Technology Support Services



sdrma.org

Questions
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About

SDRMA



Background

Special District Risk Management Authority is a public agency formed under California Government Code Section 6500 et seq. and provides a full-service risk management program for California's local governments. SDRMA was established in August 1987 and provides comprehensive insurance coverage to special districts throughout the state of California.

Our Vision

To provide excellent risk financing and risk management services through a financially sound pool to California public agencies, delivered in a timely and responsive cost-efficient manner. Our combined membership totals over 650 individual public agencies.

PROPOSAL REQUEST



Special District Risk Management Authority (SDRMA) is seeking competitive proposals from qualified Information Technology firms for Information Technology Support Services: to maintain the Authority's IT and communications infrastructure and network; to set-up and configure new computers/peripherals; to provide required end-user support; to develop a long range strategic plan for its future IT infrastructure, security management, equipment and service needs; and to provide as-needed Cloud Computing Services to transition and augment the Authority's computing environment in areas such as disaster recovery services and emerging technologies.

The duration of the contract awarded as a result of this RFP is expected to be three years from the date of execution of the agreement.

SDRMA may also seek services such as acquiring, configuring, monitoring and assessing the use of new devices and systems, as well as support to ensure compatibility between all systems and hardware.



SCOPE OF WORK

The primary scope of work is to provide on demand support, routine preventative maintenance service and recommendations for improving existing systems and providing technical support for future designs and purchases of equipment, software, and licenses agreements in coordination with and directed by SDRMA. Consultant will provide general professional services on an as-needed/as-instructed basis primarily during normal business hours: 8:00 a.m. to 6:00 p.m. Monday through Friday, either remotely or on-site. The scope of work to be performed by Consultant will be coordinated and managed by designated SDRMA personnel.



OVERVIEW OF SERVICES TO BE PROVIDED

The qualified vendor would provide necessary technical services, which would enable SDRMA to:

Protect

Protect, secure and maintain its technology infrastructure, software, hardware, equipment and facilities.

Ensure

Ensure the efficient operation of its networks and related computer and communication systems in its defined user community.

Enhance

Enhance its quality of service for departments defined in the enclosed schedules.

Minimize

Minimize spending and maximize the return on investment in technology.

The ideal Consultant will resolve computer systems and network issues in accordance with standard and acceptable Best Practices for maintenance and support benchmarks. The successful Consultant will be expected to have a Help Ticket system and a Help Desk; to organize Help Desk service calls efficiently, either remotely or onsite, and to ensure that there is no significant computer downtime during normal working hours, generally 8:00 a.m. to 6:00 p.m., Monday through Friday. The Consultant is expected to report on the status of technology issues and communicate effectively with SDRMA. The Consultant will also describe the hours of operation for the Help Desk and what happens outside the hours of operation in the event of a major system crash or other urgent need.

SERVICES REQUIRED



The following types of services will be required of the Consultant and are subject to change at the discretion of SDRMA:

- desktop application support
- server and workstation administrative services
- network administration services
- email
- security and backup efforts
- planning, and
- on-demand response, with the assumption that confidentiality will be extended in all services performed.

The successful Consultant shall perform the following:

Desktop Application Support

- Perform basic support functions as needed/requested, including the installation of PC's, laptops, tablets, printers, peripherals, and software.
- Diagnose and correct desktop applications issues.
- Configure all computers for standard applications.
- Identify and correct end user hardware problems and perform advanced troubleshooting.

Server and Workstation Administrative Services

- Manage computer network and associated hardware, software, communications and operating systems necessary for the quality, security, performance, availability, recoverability and reliability of the system.
- Monitor server performance and capacity management services.
- Ensure scheduled preventive maintenance for equipment is promptly performed.
- Develop back-up plans and procedural documentation.
- Configuration management, including changes, upgrades, patches, etc.
- Support of software products relating to servers and workstations.
- Timely response to repair and maintenance work for the user.

Network Administration Services

- Maintain and support network equipment, including switches, firewalls, routers and other security devices.
- Install and maintain printers, scanners, network devices and other computer peripherals.
- Analyze routine configuration changes and install software patches and upgrades as well as minor cabling if needed.
- Complete proactive monitoring of network equipment including alert notifications to designated District personnel in the event of device failure.
- Monitor and manage network performance and capacity management services, and network troubleshooting.
- Maintain network documentation and procedures.

SERVICES REQUIRED



Email

- Manage SDRMA's email system and ensure domain names are maintained properly.
- Add, delete and/or change employee email accounts as needed by SDRMA; ensure that each email account is working efficiently and effectively free of uninterrupted errors; and ensure that each individual email account can maintain ample server space.

Security and Backup Efforts

- Ensure that all servers, desktops and laptops are protected by antivirus software and that adequate firewalls are in place to prevent unwanted intrusion into SDRMA's computer network system.
- Systems shall be designed to notify designated SDRMA personnel when system securities are breached and or when system hardware is not operating efficiently.
- Perform security audits as requested and notify designated SDRMA personnel immediately of suspected breach of security or intrusion detection.
- Establish and maintain a backup system to prevent loss of data and functionality as well as reduce downtime.
- Configure SDRMA's system to enable remote access in a secure environment and provide remote access administration as requested by SDRMA.

Planning

- Assist with planning and designing major system enhancements, including installations and upgrades of new and existing systems (examples include storage system upgrades, redesign of backup systems, etc.).
- Provide technical leadership for server technology issues.
- Make recommendations for future purchases of hardware, software and technology needs.
- Install new servers, software and hardware and transfer data when acquired.
- Engage in strategic planning, design and installation/upgrade of core network systems as required by changing SDRMA capacity and storage needs.

On-Demand Response

- Offer on-demand response to the SDRMA's IT requests.
- Maintain availability during SDRMA's normal business hours.
- Perform maintenance service after hours, on weekends, and in situations which would least likely disrupt daily operations (specific times and dates shall be coordinated with designated SDRMA personnel).

Confidentiality

Confidentiality of computer information and data is vital. The selected Consultant and their employees will be required to sign and adhere to a confidentiality clause that information in the system must remain confidential under penalty of law.



Not Included

The contract to be awarded does not obligate SDRMA to purchase computer equipment, hardware devices, cabling, licenses, software et al from the successful vendor. Replacement parts are not part of this contract. The scope also does not include computer equipment and networks not owned by SDRMA.



SPECIFIC DUTIES & SERVICES



Support Services and Ongoing Maintenance and Repair

The Consultant will provide general day-to-day information technology support services and ongoing maintenance and repair of existing network and systems. SDRMA is looking for a responsive maintenance and support program to accommodate departmental computer system activities and user equipment performance. SDRMA expects the vendor proposal to define, in detail, the approach to be used in the below categories. For each of the items, the Proposal should describe its process for performing the services, response time, primary team member to be assigned listing team member credentials, performance metrics and monthly/periodic reporting available to SDRMA.

Services include but may not be limited to, the following:

- Help Ticketing/Help Desk
- Desktops – hardware, software, virus software, security
- Software – assist with technical issues
- PC Hardware – install replacements, upgrades
- Printers – local and network
- Personnel movement – technical equipment (not furniture)
- Provide quotes for equipment, desktop software using state contracts
- Active Directory password control
- Active Directory maintenance
- Email maintenance
- User account maintenance
- Server maintenance – routine cleanup and monitoring
- Operating System patching
- SQL Server Data Base – routine cleanup, monitoring, virus software, security
- Establish a Management Console
- Maintain backup programs and scripts; provide documentation for backups
- Restore files and folders from back-ups (as required)
- System security and firewalls
- Network controls and switches
- UPS devices
- Coordination, liaison with third party software/hardware vendors (Currently ALX, ADP, Fund Balance, The Marina Program, AT&T, VOIP-8x8, Comcast, Konica) to ensure ongoing connectivity and user access. The exact vendors are subject to change and the Consultant will assist in SDRMA's transition

SPECIFIC DUTIES & SERVICES



Following is further detail regarding SDRMA's expectations with regard to services:

Desktop Application Support

- Performance of basic support functions as needed/requested, including the installation of PC's, laptops, tablets, mobile devices, printers, peripherals, and software.
- Diagnosis and correction of desktop applications issues.
- Configuration of all devices for standard applications.
- Identification and correction of end user hardware problems and performance of advanced troubleshooting.
- Maintenance of an updated inventory of all related computer hardware, to make available to SDRMA personnel upon request and implementation of Help Desk procedures under policy constraints of the successful vendor.

Server and Workstation Administrative Services

- Management of networks and computer systems, including complex applications, databases, messaging, servers and associated hardware, software, communications, and operating systems, necessary for the quality, performance, security, availability, reliability, and recoverability of the systems.
- Scheduling of preventive maintenance for equipment in the areas of coverage and ensuring that it is properly and promptly performed.
- Monitor server performance and capacity management services.
- Develop back-up plans and procedural documentation.
- The Consultant shall be responsible for configuration management, including changes, upgrades, patches, etc.; and support of software products relating to servers and workstations; timely response to repair and maintenance work for the user.
- Maintenance of records for all Help Desk Tickets for both on-site visits and telephone/remote support and facilitating access to Help Desk Tickets by SDRMA designated staff.
- Configuration management, including changes, upgrades, patches, etc.; management and documentation of network and user logins and passwords and security documentation.

Network Administration Services

- Maintenance and support of network equipment, including installation and maintenance of network software, switches, firewalls, routers, and other security devices.
- Installation and maintenance of printers, scanners, network devices, etc.
- Analysis, routine configuration changes, installation of patches and upgrades and minor cabling if needed.
- Alert notifications in case of equipment failure.
- Proactive monitoring of network equipment, including performance indicators to report on threshold limitations.
- Network performance and capacity management services.
- Continuous troubleshooting required.
- Maintenance of network documentation for daily, weekly, and monthly services required.

SPECIFIC DUTIES & SERVICES



Email and Security Efforts

- Maintenance of SDRMA email accounts using SDRMA domain, including adding, changing, and/or deleting SDRMA employee accounts as requested.
- Maintenance of virus detection programs on SDRMA servers and user computers and laptops.
- Performance of periodic security audits, including notification of suspected breaches of security to designated SDRMA personnel are required.
- Configuration of SDRMA systems to enable remote access in a secure environment with provisions for remote access administration as requested by designated SDRMA personnel.

Backup Services

- Maintenance of SDRMA Backup systems.
- Recommendations for redundant backup programs, should they be indicated.
- Requirements for a data backup policy, with procedures in place to handle daily, weekly, and monthly backup of stored files and programs.
- Identification and implementation of a program to restore systems and data if servers and/or computers go down.

Planning

- Engineering, planning, and design services for major system enhancements and/or upgrades to existing systems.
- Recommendations for future purchasing and technology needs, when requested or necessary, including identification and implementation of a cloud-based, remote-access file-sharing system such as Microsoft SharePoint.

Installation and Software Implementation Services

- Installation of new equipment, software, and transfer existing data when acquired, will be needed.
- Coordination of implementation of a cloud-based, remote-access file-sharing system such as Microsoft SharePoint.
- Upgrades to existing systems, other than regular repair or maintenance.
- Changing or moving email or web services to new vendors or new services.
- Clean up or installation of network wiring.
- Evaluation and recommended network management software, except as part of IT Strategic Plan.
- Implementing new disaster recovery and emergency operations related activity.
- Transitioning efforts to an as-needed cloud computing services.

INVENTORY, ASSESSMENT, AND STRATEGIC FORECASTING PLAN

SDRMA is seeking to also have Consultant develop a longer-range IT strategic forecasting plan as to future IT hardware and software needs to maintain its systems on an ongoing basis. SDRMA will utilize this plan in determining what to allocate on an expenditure basis in its future budget processes. The Plan should also include a review of the inventory, assessment of the system architecture and equipment for efficiency, life expectancy, capacity, speed, and current processes, and make recommendations for improving routine support criteria and eliminating emergency maintenance situations.

SUBMITTAL OF PROPOSALS - VENDOR INFORMATION

Company name (including dba's), address and website address

- Parent company if applicable
- Contact name(s), title, e-mail address and phone number
- Company biography
- Location of main office and any other offices that may be involved

If any subcontractors are going to be used, please provide clarification of when and how they will be engaged and their qualifications. Do they work with your organization frequently or only during certain times or on certain projects?

(1) Commercial General Liability

The Consultant shall, at its own expense, procure and maintain Commercial General Liability insurance providing bodily injury and property damage coverage with a combined limit of at least One Million Dollars (\$1,000,000) each occurrence and a general aggregate limit of at least Two Million Dollars (\$2,000,000).

(2) Business Automobile Liability

The Consultant shall, at its own cost and expense, procure and maintain Business Automobile Liability insurance providing bodily injury and property damage with a combined single limit of at least One Million Dollars (\$1,000,000) per occurrence for all owned, non-owned and hired automobiles. This insurance shall provide contractual liability covering all motor vehicles and mobile equipment to the extent coverage may be excluded from general liability insurance.

3) Workers' Compensation and Employers' Liability

If the Consultant employs any person to perform work in connection with SDRMA, the Consultant shall procure and maintain at all times during the performance of such work Workers' Compensation Insurance in conformance with the laws of the State of California, and federal laws where applicable. Employers' Liability Insurance shall not be less than One Million Dollars (\$1,000,000) for each accident and One Million Dollars (\$1,000,000) for each disease, with a policy limit of One Million Dollars (\$1,000,000).

(4) Professional Liability

The Consultant shall also maintain Professional Liability Insurance covering the Consultant's performance under this Agreement with a limit of liability of One Million Dollars (\$1,000,000) for any one claim.



CONFIDENTIALITY/SECURITY



Please describe measures utilized by your company to assure that information is held confidentially. Include record destruction cycles, computer security, and file storage/processes. Please provide detail regarding the method(s) or procedure(s) to be used to ensure compliance.

CUSTOMER SERVICE

SDRMA shall be deemed the owner of any stored data. Describe how you will provide data upon request. Please provide any applicable internal policies and procedures that are followed to ensure up to date and overall customer satisfaction with the end result of the service. Please describe your organization's culture and methodology in adding new business. How do you approach implementation? What is most important to you during an implementation? Are there any specific techniques that you use that would set you apart from others? Outline a clear plan of escalation paths for issue resolution. Outline the chain of command within your organization for escalating problems that are not resolved to SDRMA or any client's satisfaction.

PROPOSAL REQUIREMENTS

SDRMA will only review proposals that include:

- A response to all questions in this document.
- A brief background on your firm, provide specific information in this section concerning the firm's experience in the services specified in this RFP, preferably within the State of California. Provide the names of public agencies that your firm has routinely serviced as a primary provider within the last three years. The narrative should also include the qualifications of key personnel that will provide consultation services under this proposal, including subcontractors.
- A proposed compensation arrangement. The proposal shall clearly state ALL of the costs associated with the project, broken down by products and services, and all on-going costs for recommended or required products and services, such as maintenance. (SDRMA reserves the right to clarify and negotiate the compensation arrangement with any or all potential vendors.)
- A clear indication of which services your company will be able to provide in accordance with the "Scope of Work" section above.
- A clear indication of which services your company will not be able to provide in accordance with the "Scope of Work" section above.
- A clear indication of any additional services that your company will provide that are not listed in the "Scope of Work" section.

CONFLICT OF INTEREST

The proposer shall agree to disclose any conflicts of interest which may arise from the awarding of this contract to the bidder. Additionally, proposer shall agree to disclose any business for which they have a financial interest. If such financial interest results in income stemming from a contract or other working relationship with SDRMA, proposer must agree to provide periodic reports of such income in full disclosure of any financial gain realized directly or indirectly from SDRMA. (Note: such income is not prohibited, but it must be disclosed).

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ETHICAL BUSINESS PRACTICES



SDRMA takes an interest in ensuring that the companies we do business with operate their business in an ethical manner. Proposer shall disclose any and all judgements against them, legal matters, ongoing or completed investigations, or any unethical practices that are public knowledge and that may affect their ability to do business or their reputation, to the extent that proposer is able to do so.

FINANCIAL STATEMENTS

SDRMA has a vested interest in verifying the financial stability of the partner selected. Therefore, as part of this proposal, the bidder is asked to provide their most recent financial statements, along with their most recent financial audit, if available. If the financial information is considered to be privileged it can be provided in a sealed envelope marked as “Confidential Material”, or otherwise identified as confidential. This will exempt these documents from those needing to be provided in response to a public records request, so long as they meet the requirements of an exemption under the Public Records Act.

PROPOSAL SUBMISSION

Send proposals to:
Special District Risk Management Authority
Attn: Matt Clutterbuck, Chief Financial Officer
1112 I Street, Suite 300, Sacramento, CA 95814
mclutterbuck@sdrma.org



All proposals must be received at the location above no later than 4:00 p.m. on Tuesday, October 29, 2024. Late proposals will not be considered. All proposals, whether selected or rejected, shall become the property of SDRMA.

AWARD OF CONTRACT

SDRMA reserves the right to reject any and all proposals submitted. The award of the contract will be made to the firm, in the sole opinion of SDRMA, which will provide service that best meets the needs of SDRMA.

ADDITIONAL INFORMATION

Requests for additional information or assistance relative to the Request for Proposal may be directed to:

Attn: Matt Clutterbuck, Chief Financial Officer
Special District Risk Management Authority
1112 I Street, Suite 300, Sacramento, CA 95814
mclutterbuck@sdrma.org

