



Request for Proposal

Outsourced IT & Managed Services

ISSUE DATE:
10/05/2023

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1 Request for Proposal (RFP)

PlanRVA (legally known as the Richmond Regional Planning District Commission; sometimes shortened to RRPDC) invites you to respond to this Request for Proposal (RFP). The focus of the RFP is to select a single organization to provide IT managed services to PlanRVA over a three (3) year period, beginning on July 1, 2024 and ending no later than June 30, 2027. Following the initial term, there is a possibility to renew this contract for multiple one (1) year terms.

2 Introduction to PlanRVA

PlanRVA is an intergovernmental agency that facilitates collaboration among the nine local jurisdictions in the Richmond region. PlanRVA provides planning assistance, regional transportation planning and programming, and demographic, economic, and geographic information services.

3 Overview of Current PlanRVA Technical Environment

- Martha Shickle is the Executive Director of PlanRVA, but the primary contact for all operational and technical items is Mark Bittner.
- There are 26 employees at PlanRVA, but there are small fluctuations that result from interns, grants and special projects.
- Endpoint devices are a combination of laptops and desktops running Windows 10/11 and Microsoft 365. There are approximately 32 laptops and 3 desktops. PlanRVA tries to manage a 3-year life cycle.
- PlanRVA staff works from both office and home locations. Many carry their laptops between locations.
- The local network includes two Cisco Switches, one Cisco Firewall and three Wireless Access Points. All equipment is less than one year old.
- Data is backed up via Microsoft OneDrive and SharePoint.
- Managed Services and Technical Support are currently provided by Proxios/Sourcepass.
- Email is currently filtered through Mimecast.
- The Boardroom Audio/Visual equipment has an interface with the local network. AV equipment is distinct and currently maintained by Productive AV.
- There is one security camera focused on the main entrance that interfaces with the local network.
- The phone system is Zoom VOIP. Calls are routed to desk phones and personal cell phones via the Zoom App.
- Internet service provider is Comcast.

4 Value Added Service Requirements

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

- **Microsoft 365 administration and advising** – PlanRVA wants to maximize the effectiveness of its platform and hopes to partner with a Microsoft 365 expert.
- **Help desk and technical support** – Ability to support PlanRVA's inquiries as required, via a combination of on-site support and help desk, including support for remote users.
- **Network and email system monitoring** – 24/7 monitoring of PlanRVA's network and email services with proactive communication and escalation protocols based on the severity of any unscheduled outages.

- **Network and endpoint security** – Install and manage the selected virus protections application. Provide intrusion detection and protection services to provide a safe and secure working environment.

5 Optional Service Requirements

In addition to the Service Requirements listed previously, PlanRVA welcomes input on how your organization might provide the following services:

- **Technology strategy planning** – Working with current IT staff to develop a long-term strategic technology plan.
- **Solution design** – Solution packages (e.g., hardware, software, licensing) and associated consolidation of data.
- **Patch management** – The process that helps acquire, test and install multiple patches (code changes) on existing applications and software tools on a computer, enabling systems to stay updated on existing patches and determining which patches are the appropriate ones.
- **Procurement management** – Selection of commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.
- **Move, Add, Change (MAC)** – Changes to the location or configuration of existing equipment or software, and installation of additional equipment or software.
- **Warranty, break fixes and installation** – Planned and on-call services, including emergency response.
- **Reporting and communication** – Ensuring monthly reporting on all purchases, assets, current activities and issues, and project status reports.
- **IT policy review and development** – Development of customized policies related to the use of technology.
- **Unit evaluation and testing** – Formal evaluation of new hardware.
- **Implementation planning and guidance** – Assistance in deployment planning, project management and execution.
- **Image development and management services** – Assistance in planning and designing standard images.
- **Image loading** – Prior to delivery and installation.
- **Configuration** – Full assembly of hardware and software, including testing and burn-in.
- **PC deployment** – Delivery and setup of machines on-site.
- **On-site implementation of business applications** – Installation of non-image software.
- **Asset inventory management** – Tagging, tracking, and management of warehousing and inventory.
- **Life cycle management of hardware units** – Process for end-of-life notification, replacement, and asset decommissioning/disposal.
- **Software licensing control** – Oversight of automatic renewal of software applications and maintenance of appropriate documentation.
- **Software support** – Some level of desktop software support and user training is desirable.

6 Selection Criteria and Award

PlanRVA will use multiple criteria to select the most appropriate partner. Respondents are encouraged to be as aggressive and creative as possible in their proposals. The following list summarizes the major qualitative areas that will be evaluated.

- Industry expertise and experience
- Demonstrated customer service quality and support
- Previous relevant experience
- Vendor strength and stability
- Account management
- Reporting capabilities
- Financial considerations

Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals, on the basis of the factors identified above in the Request for Proposal, including price. Negotiations shall then be conducted with each of the offerors so selected. The offeror shall state any exception to any liability provisions contained in the Request for Proposal in writing at the beginning of negotiations, and such exceptions shall be considered during negotiation. Price shall be considered, but need not be the sole or primary determining factor. After negotiations have been conducted with each offeror so selected, PlanRVA shall select the offeror which, in its opinion, has made the best proposal and provides the best value, and shall award the contract to that offeror. PlanRVA may make multiple awards to more than one offeror should it determine in its sole discretion. Should PlanRVA determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror.

7 Response Contents and Format

Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Your response to this RFP will serve as the basis for the consideration of your potential as a partner.

8 Information Requirements

For the purposes of understanding more about your company and your ability to successfully fulfill this important PlanRVA requirement, please provide the information below as part of your response, clearly referencing each specific question.

8.1 Corporate Information

1. Give a brief overview of your organization's involvement in providing IT value added services in the marketplace.
2. How long has the organization been in this business and what is your current market share?
3. Provide your organization's annual sales volumes.
4. In what cities do you maintain offices?
5. Indicate the number of employees in your organization. How many of those are dedicated to account management and/or technical support?
6. How many are full-time vs. contract?
7. Please describe your relationships and experience with manufacturers and major distribution partners in the technology marketplace.
8. What differentiates your organization from your competitors in the marketplace and how will this be relevant to us?
9. Will you subcontract any components of the proposed solution to third party organizations? If so, please describe the components to be subcontracted and provide details of any agreement in place with the subcontracted

firm/individuals as well as a summary of past work that you have successfully completed together.

10. Please describe your organization's experience in transitioning clients to public or private cloud technology from more traditional IT service models.
11. Please provide details of three current customer accounts that are similar in scope and requirements to those of PlanRVA.

8.2 Proposed Approach and Solution

1. Please provide a proposed work plan for a migration to your organization as a PlanRVA preferred vendor. Specifically, provide the following information:
 - i. Key activities
 - ii. Timing
 - iii. Information/resource requirements from PlanRVA
 - iv. Deliverables
 - v. Key milestones, checkpoints, and other decision points
2. If we elect to move forward with your organization, what PlanRVA resources would you require (e.g., information, data, staff resources, communication) during the course of migration and on an ongoing basis?
3. Please identify the team that will be assigned to the account and describe how you plan to interact with us and any third-party providers that may provide services to PlanRVA.
4. Please describe your experience in providing the following value-added services:
 - a. Remote backup
 - b. Technology strategy planning
 - c. Solution design
 - d. Network and email system monitoring
 - e. Procurement management
 - f. Move, Add, Change (MAC)
 - g. Warranty, break fixes and installation
 - h. Technical support, including on-site and remote user support
 - i. Reporting and communication
 - j. IT policy review and development
 - k. Unit evaluation and testing
 - l. Implementation planning, project management and guidance
 - m. Image development and management services
 - n. Image loading
 - o. Configuration
 - p. PC deployment
 - q. On-site implementation of business applications
 - r. Asset inventory management
 - s. Life cycle management of hardware units
 - t. Software licensing control
 - u. Desktop software support and training
5. Can you provide specific examples of how you have worked with customers that began with significant technology limitations and helped to successfully transform them into organizations with well planned and executed technology strategies? What were the critical success factors in this transformation?
6. How can we be confident that hardware pricing levels will be aggressive and will remain highly competitive over a multi-year period during which new models may be introduced?

8.3 Support

1. Describe fully your technical support options including the assistance request process, escalation process, support hours, response times, staffing levels, staff expertise, and physical location of the help desk.
2. Please provide details on your standard reporting capabilities.
3. Describe any documentation and support (e.g., user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.
4. What options are available for user training and technical training that may be required by our staff?
5. Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.
6. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?
7. The PlanRVA user base varies considerably in its level of technical sophistication. Please describe your experience in successfully supporting users that may be remote and possess limited technical skills.

8.4 Financials

1. Describe the pricing model(s) that you typically employ for your standard services.
2. What is the standard markup that you charge on the following types of technology units:
 - a. Laptops
 - b. Desktops
 - c. Servers
 - d. Other hardware
 - e. Software
3. Please indicate the charges associated with each of the following services, including the key driver of each cost and whether it is included in a standard per-unit cost vs. charged on an ad hoc basis.
 - a. Remote backup
 - b. Technology strategy planning
 - c. Solution design
 - d. Network and email system monitoring
 - e. Procurement management
 - f. Move, Add, Change (MAC)
 - g. Warranty, break fixes and installation
 - h. Technical support
 - i. Reporting and communication
 - j. IT policy review and development
 - k. Unit evaluation and testing
 - l. Implementation planning and guidance
 - m. Image development and management services
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 - q. On-site implementation of business applications
 - r. Asset inventory management
 - s. Life cycle management of hardware units
 - t. Software licensing control
 - u. Desktop software support and training

4. Do you offer service bundles and if so, describe the effect of this bundling on your pricing.

9 Communications and Response

Mark Bittner is the designated PlanRVA representative for this initiative. For any information relative to this RFP, please direct inquiries to him at the contact information below:

[Mark Bittner](mailto:mbittner@planrva.org), Director of Data & Technology
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 Richmond, VA 23224
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10 Clarification Questions

Please submit any clarification questions regarding the RFP no later than October 13, 2023. Answers will be provided to all respondents by the *Answers Provided* date.

11 Response Delivery Instructions

Please submit an electronic copy of your proposal to the email address indicated in the *Communications and Response* section above. All responses must be received on or before close of business (5:00 pm ET) on the *Proposals Due* date indicated in the *Key Dates* table below.

12 Vendor Presentations

Our intention is to hold presentations/demonstrations with one or more firms on the *Presentations* dates indicated in the *Key Dates* table below. The presentations will be held at PlanRVA at 424 Hull Street, Suite 300, Richmond, VA 23224 and we will try to provide the successful firms with as much advance notice as possible.

13 Key Dates

Event	RFP Issued	Questions Due	Answers Provided	Proposals Due	Presentations
Date	10/05/2023	10/13/2023	10/25/2023	11/09/2023	01/08/24-01/26/24
Time	17:00 EDT	17:00 EDT	17:00 EDT	17:00 EDT	Various

14 No Obligation

The submission of a proposal shall not in any manner oblige PlanRVA to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.

15 No Guarantee

PlanRVA makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.