



REQUEST FOR PROPOSALS

Information Technology Assessment and Strategic Technology Plan

Solicitation Issue Date: December 1, 2020

Responses Due: January 15, 2021, 12:00 pm (PST)

Please submit proposals electronically to vminton@sonomarc.org

Hard copy proposals will not be accepted

I. INTRODUCTION

The Sonoma Resource Conservation District (RCD) is requesting proposals from qualified firms to provide professional services to conduct a needs assessment and develop a Strategic Technology Plan to serve as a road map for addressing the short and long-term technology needs of the RCD. Information technology is essential to the RCD's ability to deliver services to the community. The RCD desires to plan for short- and long-term changes that will allow our team to work more efficiently and effectively, maintain key data in a secure and accessible manner, reduce risk associated with IT systems, all while supporting the transition to a more seamless mix of in-office and remote work. The Consultant shall assess the RCD's existing information technology systems, analyze the RCD's current and future technology and business needs and develop a plan with clear goals and action items. The plan shall identify high priority items and projects and be structured in a manner that allows for ease of implementation.

The RCD is a local government agency whose mission is to empower and partner with landowners and the community to address Sonoma County's most pressing natural resource concerns. For more information, please visit sonomarc.org.

II. EXISTING INFRASTRUCTURE

The RCD contracts with an outside vendor for the management, monitoring, and maintenance of the RCD server and as-needed end-user technical support. The RCD has a physical server along with a network infrastructure and personal computers on site at its Santa Rosa office. The PCs vary by manufacturer, age, and specifications. In the remote work environment, staff connect to the server via VPN, with most using personal computers to access a remote desktop, and a few staff using RCD-issued laptops that do not require connection to a remote desktop.

RCD computers operate on Windows 10 Pro and run Office 365. RCD staff utilize a variety of software, depending on responsibilities, including ArcGIS, AutoCAD, Quickbooks Desktop Enterprise, Adobe

Creative Suite, custom Access databases, and a variety of web-based platforms. Consultants who have experience with the above software platforms are preferred.

III. SCOPE OF WORK

The RCD anticipates that the Consultant shall perform the tasks outlined below; however, proposers are encouraged to develop a plan they believe will most effectively meet the RCD's objectives of assessing the RCD's current technology system, identifying any technological, service, and security gaps and develop and implement a plan for improvement.

1. IT Assessment

Develop an assessment of the RCD's IT systems, in collaboration with the RCD's Technology Committee. The assessment should evaluate the RCD's IT ecosystem in six areas:

- Data Systems
- Collaboration & Productivity
- Security & Continuity
- Support
- Infrastructure
- Governance

The technologies and processes assessed should include:

- Phone, internet and network infrastructure, including support of mobile devices and remote access
- End-user computers, servers, printers, tablets and other devices
- Productivity and collaboration tools: email, file and chat collaboration, virtual meeting tools
- Databases
- Security and backup practices
- Training and support processes
- IT budget practices, job descriptions and decision making

Work products include:

- Assessment plan
- Report on findings, including strengths and weaknesses of each component of the RCD's IT architecture, and the RCD's IT architecture as a whole

Technology Committee Involvement:

- Provide feedback on assessment plan and findings
- Coordinate access to stakeholders, facilities, documentation, etc. needed for assessment process

2. Strategic Technology Plan

With iterative input from the Technology Committee, develop a Strategic Technology Plan. Research solutions based on the RCD's current infrastructure and current and projected future needs. Make recommendations and alternatives to the Committee. Develop a prioritized list of improvements and corresponding budget.

Work product is a written Strategic Technology Plan including:

- Prioritized recommendations for system improvements, including implementation processes and schedule for each
- An overall technology budget that includes the recommended improvements
- Recommendations for training and other actions to enhance adoption
- Governance guidance on how to use staffing, policy and procedures to manage, support and promote technology use across the organization
- Practical actions to improve security infrastructure and practices to achieve an acceptably small risk footprint

The Strategic Technology Plan shall be structured in a manner that allows for ease and clarity of implementation. The Plan should address the most critical system needs of the next 5 years.

Technology Committee Involvement:

- Review recommendations presented, provide feedback, including requests for additional alternatives as needed
- Receive final report presentation from Consultant and make recommendation to RCD Board regarding adoption of Strategic Technology Plan

IV. PROPOSAL

Proposals should not include any materials to be returned to the Consultant and should be a concise statement. Each proposal must include the following information:

1. Qualifications Statement

- A brief description of the firm or business entity, including firm history, number of employees, organization structure, ownership structure and expertise, and resumes for principals or key employees who would perform the Services in this Solicitation;
- A detailed listing and description of experience and other information that demonstrates the Respondent's expertise and capacity to provide the Services specified in this Solicitation. The successful Respondent shall be familiar with technology best practices as well as the products and applications (including engineering & accounting software) currently in use by the RCD and available on the market, and be able to not only evaluate each component but also evaluate how all the components function together;
- A list of at least 3 references from clients to whom the Respondent has provided services similar and comparable to those described in this Solicitation (contact name, telephone, email address, contract term);
- Description (as applicable) of any value-added services the Respondent is able to provide to the RCD either for a fee or as complimentary service;
- Description of the Confidentiality and Security Plan for information sharing;
- Disclosure of any financial interests related to the work to be performed (e.g. Respondent is a re-seller of products that may be recommended in the Strategic Technology Plan);
- Indication of small business status (as established by the Small Business Administration (13 CFR Part 121.201)), or minority-owned business;
- A statement certifying that the Consultant is not listed on the General Services Administration's government-wide System for Award Management (SAM) Exclusions list, in accordance with 2 CFR Part 180.

- Any other relevant information that Respondent believes would assist the RCD in evaluating the submittal.
2. Proposed Fees
 - Provide a total not-to-exceed budget for the proposed scope of work;
 - Specify all hourly rates for service; including all travel time, nights, weekends and holidays;
 - List any other fees associated with the proposed scope of work;
 - Describe what could result in a change order.
 3. Proposed Timeline

Provide a schedule identifying all tasks and subtasks to be performed to conduct the IT assessment, and develop the Strategic Technology Plan. Indicate the total time required to complete each phase including detailed information regarding the time expectations for RCD Technology Committee participation. The timeline should assume a contract execution date of January 31, 2021 and be designed to deliver the Strategic Technology Plan by April 30, 2021.

All proposals must be emailed to vminton@sonomarcd.org by 12:00 pm (PST) on January 15, 2021.

Hard copy proposals will not be accepted.

V. QUESTIONS REGARDING THIS SOLICITATION

The RCD will respond to questions and requests for clarification to the Request for Proposal in written RFP Addendum(s) as needed, to be posted on the RCD website in the same location as this solicitation. Inquiries should be directed by email to vminton@sonomarcd.org. No verbal requests will be accepted.

All requests for clarification must be received by 12:00 pm (PST) on December 15, 2020.

Firms interested in this RFP may email vminton@sonomarcd.org to be included on an email list to receive any RFP Addendum(s) generated.

VI. RESPONSE PREPARATION

No reimbursement will be made by the RCD for costs incurred in the preparation of the response to this Request for Proposal. Submitted materials will not be returned and become the property of the RCD.

VII. INSURANCE REQUIREMENTS

Consultant, at Consultant's sole cost and expense and for the full term of the resultant contract or any extension, shall obtain and maintain at least all of the insurance requirements of the RCD.

Proof of insurance coverage shall be provided as part of the proposal and shall include the insurance types and required coverages specified below. If awarded the contract, the Consultant agrees to submit proof that the RCD is named as an additional insured by separate endorsement.

- A. Insurance Services Offices Office Commercial Liability coverage (Occurrence Form CG 0001)
- B. Insurance Service Offices Form Number CA 0001 covering Automobile Liability, Symbol 1 (any auto)
- C. General Liability: One million dollars (\$1,000,000) per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a

- general aggregate limit is used either the general aggregate limit shall apply (with the ISO CG 2503, or ISO CG 2504, or insurer's equivalent endorsement provided to the SRCD) or the general aggregate limit shall be twice the required occurrence limit.
- D. Automobile Liability: One million dollars (\$1,000,000) for bodily injury and property damage for each accident limit.
 - E. The general liability policy shall cover bodily injury and property damage liability, owned and non-owned equipment, blanket contractual liability, and completed operations liability.
 - F. The automobile liability policy shall cover all owned, non-owned, and hired vehicles.
 - G. Workers' Compensation and Employer's Liability Insurance: Provide proof of insurance verifying that it is insured (or be qualified self-insured) under the applicable laws relating to workers' compensation insurance, in accordance with the "Workers' Compensation and Insurance Act," Division IV of the Labor Code of the State of California and any Acts amendatory thereof.

VIII. RIGHT TO REJECT PROPOSALS

Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposal unless clearly and specifically noted in the proposal submitted and confirmed in the agreement between the RCD and the firm selected. The RCD reserves the right without prejudice to reject any or all proposals.