



REQUEST FOR PROPOSALS

Managed Information Technology Services

Solicitation Issue Date: August 16, 2021

Responses Due: October 1, 2021

Please submit proposals electronically to vminton@sonomarc.org

Hard copy proposals will not be accepted

I. INTRODUCTION

The Sonoma Resource Conservation District (RCD) is pleased to invite you to respond to this Request for Proposals (RFP) for Managed IT Services. The intention of this RFP is to solicit responses and formal proposals from qualified Managed IT Services Providers (MSPs) and select a single organization to provide IT services to the RCD.

The RCD's mission is to bridge the needs of the community and natural resources by empowering people through reliable expertise and action to strengthen the resilience of Sonoma County.

Since 1946, the RCD has facilitated natural resource conservation through community involvement, education, technical expertise and scientific research. We are committed to utilizing voluntary, cooperative and scientifically sound methods to ensure that the natural resources of the watersheds within the District are sustained, conserved, restored and protected within a landscape of productive agriculture, growing cities, and wild lands.

As a legal subdivision of the State of California, the RCD is organized to support natural resource management solutions through partnerships with individuals, organizations and agencies. We collaborate to drive conservation initiatives locally, regionally and statewide.

We are overseen by a seven-member Board of Directors and several Associate Directors who volunteer their time for the benefit of local landowners and land managers and their natural resource concerns. Directors are local landowners in the district and are actively engaged with rural, agricultural, and natural resource conservation issues and businesses. The RCD receives between 3-5% of our annual budget from the county tax base. The remainder of RCD's annual budget comes from competitively sought grant funding and fee for service contracts to support our mission and the conservation needs of Sonoma County.

For more information, please visit sonomarc.org.

II. ENVIRONMENT OVERVIEW

Office location: 1221 Farmers Lane, Suite F | Santa Rosa, CA 95405

Number of employees: 16, all with remote access

Current IT management resources:

The RCD currently outsources IT support to a third-party vendor. The RCD has no in-house IT staff or department. Staff involvement in IT management consists of a staff contact who liaises with the third-party vendor, and a Geographic Information Systems (GIS) lead who supports licensing and training. The RCD has a small (currently 3-member) Technology Committee made up of board and staff members, whose purpose is to act as champion and hub for technology projects, advise on technology needs to be included in the RCD’s strategic plan and annual budget, and support the development of in-house digital skillsets.

Current technical environment:

The RCD owns and uses a single on-premises Dell server operating on Windows Server 2019 with eight hard drives, configured in RAID10. The RCD also has one network switch and one Sophos firewall router. The network is a flat network with no segmentation, physically or virtually. The RCD recently upgraded to AT&T business fiber internet service, with 300 Mbps upload and 300 Mbps download speeds. Backups are stored locally on a BDR appliance and synced to a cloud vault maintained by the RCD’s IT vendor.

Workstations are PCs, both desktop and laptop, operating on Windows 10. The RCD is in the process of migrating all users to laptops as existing workstations reach end of life.

Remote access to the RCD’s network is accomplished through SSL VPN Client with Sophos Authenticator for 2FA. The following table includes a summary of current systems and applications used by the RCD.

Systems and Applications	
Name	Function
Adobe Acrobat Reader & Pro	PDF reader, generator, and editor
Adobe InDesign	Marketing content development
ArcGIS Desktop and Mobile apps	Geographic Information System (GIS) mapping/cartography
AutoCAD Civil 3D	Engineering design software
Avenza Maps	Offline mobile app used for collecting GPS and site data
Constant Contact	Newsletter development and distribution
Google Drive	Document storage and collaboration (minimal use, not primary file storage system)
Innovative Business Solutions WebTime & WebPay	Web-based time and attendance and payroll software (rebranded Kronos Workforce Ready software)
Kofax/Nuance Power PDF	PDF reader, generator, and editor
MS 365 & MS Authenticator	Suite of office productivity applications, including MS Access and Teams.
Quickbooks Desktop Enterprise	Accounting system (3 users; installed on server)

Systems and Applications	
Name	Function
Sophos Central	Endpoint protection and VPN
WordPress	Website platform (maintained by an outside developer)
Zoom	Video conferencing

III. SCOPE OF SERVICES SOUGHT

A. Support & Customer Service

1. **Help Desk Support** - The MSP should offer superior Help Desk support from Tier One to Three services utilizing industry best practice processes and procedures.
2. **On-Site Support** – When needed, the MSP should have the ability to deploy onsite resources to assist in issues which cannot be resolved through remote access to in-house systems.
3. **Service Levels** – The MSP should identify service level agreements or objectives.
4. **Online customer portal** –containing access to documentation of the RCD’s environment, support tickets and maintenance tasks, inventory of assets, and service level performance metrics.
5. **Mobile Device Support** - In addition to laptops and desktops, staff use personal mobile phones and tablets (the RCD also has one tablet shared among staff). The MSP will need to support secure provisioning (and ongoing support of that provisioning) of any mobile device into the company network.
6. **Onboarding and Offboarding Staff** - The MSP must have process and procedure in place to onboard or offboard team members in a timely and efficient manner.
7. **Account Management** – The MSP must offer an internal escalation process in tandem with the RCD to ensure the ability to have multiple points of contact available if needed depending on the items or issue encountered.

B. Network

1. **Server & Networking Support** – The RCD requires proactive management and monitoring of our server, switches, firewalls, routers and Wi-Fi systems, and other networking equipment, with proactive communication and escalation protocols based on severity of issues identified.
2. **Patch Management Services & Preventative Maintenance** – The MSP must provide management of critical security and system patches to the server, devices, systems, and applications on the network to ensure the RCD’s IT systems and resources are properly managed and maintained in a manner the minimizes disruptions for end users.
3. **Remote Backup** – The MSP must execute a backup plan for the server, including a regularly-tested recovery process.
4. **Email System Management** – The RCD requires the management and administration of our MS 365 email system for all users.
5. **Business Continuity and Disaster Recovery** – The MSP must be able to support the RCD’s ability to recover and identify Recovery Time Objective (RTO) and Recovery Point Objective (RPO) based on the RCD’s environment and MSP’s capabilities.

C. Security

1. **Antivirus, Antispam & Antispyware Protection** – MSP must provide solution(s) to defend against security threats including phishing, malware, spam, viruses.
2. **Multi-Factor Authentication (MFA)** – MSP must be able to provide and manage a Multi-Factor Authentication (MFA) solution to provide an easy-to-use method to verify user identities at login and to protect logins with multi-factor authentication.
3. **Security Systems Monitoring** – MSP must provide proactive monitoring and management of the RCD's security systems, including firewalls, intrusion prevention, and secure remote access.
4. **End-User Security Awareness Training** – The MSP should offer Security Awareness Training to educate the RCD's staff about current threats, terms, standards, and compliance to avoid a security incident.
5. **Vulnerability Testing** - The MSP should offer vulnerability tests, both internally and externally, to determine what flaws and potential threats exist from the outside, or perimeter, of the RCD's business network.

D. Hardware

1. **Warranty and Asset Inventory Management** – The RCD expects the MSP to maintain and make available to the RCD a hardware asset inventory that includes Desktops, Laptops, Servers, Printers/Scanners, Fax Machines, and notify the RCD of any potential service plan or warranty issues.
2. **Lifecycle Management of Hardware Units** – The MSP should have processes for end-of-life notification, replacement, and asset decommissioning/disposal.
3. **Procurement Management** – The MSP must assist with the selection of commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.
4. **PC Deployment** – Delivery and setup of machines on-site.
5. **Desktop and Laptop Support** - MSPs must support existing and future desktop and laptop hardware, including break/fix services.
6. **Printers, Copiers and Scanners** -The MSP must be able to support existing printers, copiers and scanner related network-printing issues. The RCD's main printer/scanner/copier is under a lease that includes a maintenance plan.
7. **Move, Add, Change (MAC)** – The RCD is looking for the MSP to help with any changes to the location, configuration of existing equipment or software, and installation of additional equipment or software as needed.

E. Software

1. **Software Licensing Control** – Oversight of purchase and renewal of software applications and maintenance of appropriate documentation. The ideal MSP would have experience with and ability to obtain government pricing for software on behalf of the RCD.
2. **Desktop Software Standardization and Software Licensing and Upgrades** – MSP must have a process for identifying standardization and management of desktop images and ensuring that staff are using current products as well as current OS and browser versions.
3. **Application troubleshooting** – support of applications used by the RCD, including but not limited to those listed in the table above.

F. Strategic Support

1. **Technology Strategy Planning** – In 2021, the RCD developed a 5-year Strategic Technology Plan. Priority projects & initiatives from that plan are included in Attachment A to this RFP. The MSP will check in periodically with the RCD's Technology Committee to discuss the status of plan implementation and any changes needed.
2. **Business analysis** – the MSP should be available to discuss specific business processes and make recommendations for how technology can be used to gain efficiency.
3. **IT Policy Review and Development** – The MSP should be able to assist in the development of customized policies related to the use of technology.
4. **Project Management** – The MSP should be able to offer project management and technical engineering resources to assist with IT projects.

G. Special Projects

1. Identification and implementation of an appropriate cloud-hosting solution for file storage, management, and mobility, based on current needs and infrastructure.
2. Development of policies, procedures, and identification and implementation of a software solution for password management.

IV. PROPOSAL

Proposals should not include any materials to be returned to the responding firm and should be a concise statement. **All proposals must be emailed to vminton@sonomarcd.org by 5:00 pm (PST) on October 1, 2021.** Hard copy proposals will not be accepted.

Proposals must include the following information:

A. Organizational Information

1. Legal name of firm
2. Type of entity
3. Contact name
4. Contact address, phone number, email
5. Website
6. Name of person authorized to enter into contract on behalf of firm
7. Primary services
8. Primary market/customers
9. Number of years in business
10. Company location(s)
11. Number of employees
12. Key business partnerships (e.g., companies for which MSP is a re-seller of hardware)

B. Scope of Services: indicate clearly whether your firm can provide all services listed in Section III, Scope of Services Sought. If there are listed services that your firm cannot provide, please list those exceptions using the naming and numbering in Section III.

C. Questions:

1. Why do you believe that you are a good fit for our organization?
2. What do you feel your overall strengths and differentiators are?
3. Do you use in-house or contracted resources for services?
4. Do you follow ITIL or other processes aligned with industry standard practices?

5. Describe your onboarding/implementation process and approach if you were selected.
 6. What RCD resources would you require (i.e., information, data, staff resources, communication) during initial migration and on an ongoing basis?
 7. What do you feel are your biggest hurdles to a successful working relationship?
 8. 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.
 9. Describe any documentation and support (e.g., user manuals, online help, training, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.
 10. The RCD user base varies considerably in its level of technical sophistication. Please describe your experience in successfully supporting users that possess limited technical skills.
 11. Please provide details on your standard reporting capabilities.
 12. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?
 13. How do you notify users of maintenance windows or system outages?
 14. What types of documentation and diagrams would you typically create/maintain?
 15. What tools do you use for network monitoring?
 16. What types of monitoring agents would you use for end user devices?
 17. Describe your approach to preventive maintenance.
 18. Describe your approach to providing strategic support.
- D. Key Personnel:** Identify the key personnel and their back-ups, if any, that will be assigned to provide services. Include project experience of each person, responsibilities, years of experience (both overall and with current firm), any applicable licenses and/or certifications, and specific projects.
- E. References:** Please provide at least three references from customers with similar operations to the proposed solution. Include contact names, phone numbers, email addresses and industry.
- F. Pricing:** Please attach proposed fees and worksheets to support these fees, if applicable. Itemize non-recurring and recurring costs. Recurring costs should be quoted as per user per month and/or organization-wide flat monthly costs, as applicable. Other pricing models may be provided as an option.
- G. Contract:** Please attach your firm's standard Master Services Agreement, or other contractual documentation applicable to the services listed in this RFP.
- H. Insurance:** Verify that your firm can fulfill the insurance requirements described below.
- I. Debarment or other Disqualification:** Respondent must disclose any debarment or other disqualification as a supplier or vendor at the federal, state or local government level. Respondent must describe the nature of the debarment/disqualification, including where and how to find such detailed information.

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 5:00 pm (PST) on September 3, 2021.**

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

MSP, at MSP'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 MSP 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.

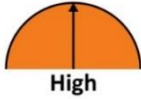


RFP Attachment A




Prioritized List of Strategic IT Projects and Initiatives

Prioritized List of IT Projects and Initiatives – Detailed		
ID	Project/Initiative Description	Priority
B	<p>Acquire IT managed services that meet the RCD’s needs. RCD identified a number of technology needs that are not being met by the current IT services provider. For example, gaps in services include end-user hardware services, proactive monitoring, and appropriate planning for software upgrades and patches. The RCD should clearly identify IT service needs through a thorough assessment and include those needs as requirements in a RFP to solicit bids from providers. Once a vendor has been selected, the RCD should implement their services and engage with RCD staff to help ensure ongoing and successful IT services.</p> <p>Department Referencing Initiative: <i>BerryDunn, RCD</i></p> <p>Strategic IT Issues Addressed: <i>Critical: M1, T1, M5,</i> <i>High: T7, A9, A11, M9</i> <i>Medium: T8</i></p>	 Critical
C	<p>Develop a password management strategy. Staff reported that a formal policy and controls pertaining to password management, including password strength and storage, does not exist. This initiative would develop policies and procedures for password management. Potential steps as part of this strategy may include acquiring a password management application, password security training, or establishing policies around updating passwords or two-factor authentication.</p> <p>Department Referencing Initiative: <i>BerryDunn, RCD</i></p> <p>Strategic IT Issues Addressed: <i>Critical: M2</i></p>	 Critical
D	<p>Increase the RCD’s internet bandwidth. The RCD currently has internet speeds of 75Mbps download and 15Mbps upload. The low upload speeds can lead to slower or inconsistent access to the VPN, particularly when multiple users are attempting to use the VPN. The focus of this initiative would be to identify the RCD’s bandwidth needs and explore options to increase the speed.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issues Addressed: <i>Critical: T6</i></p>	 Critical

Prioritized List of IT Projects and Initiatives – Detailed		
ID	Project/Initiative Description	Priority
L	<p>Transition the RCD to cloud-based file storage. Staff reported the use of the on-premise server is for saving files in directories accessible to all RCD staff. The accessibility is hindered when the files are accessed over a VPN connection and are not accessible from mobile devices in the field. This initiative would assess the impact of moving all RCD file storage to a MS365 SPO or OneDrive directory on daily operations of the RCD. The conclusion of this assessment should assist in the determination of a needed replacement on-premise server, acquisition of a cloud-based server, or if MS365 file storage meets the RCD's needs.</p> <p>Source of Project/Initiative: <i>BerryDunn, RCD</i></p> <p>Strategic Issues Addressed: <i>Critical: A8, A1</i> <i>High: A6</i> <i>Medium: T7</i></p>	 Critical
M	<p>Identify and train an MS365 application owner among current RCD staff. Staff reported little knowledge of what MS365 applications and functionality are provided with the RCD's subscription. Identifying and training a current RCD staff member on the available features and functions offered with MS365 should enable adoption of currently licensed capabilities and greater realization of the investment in the subscription.</p> <p>Source of Project/Initiative: <i>BerryDunn, RCD</i></p> <p>Strategic IT Issues Addressed: <i>Critical: A1, A8</i> <i>High: T2</i></p>	 Critical
P	<p>Implement approval workflows in MS365. Staff reported that the Director of Finance and the Executive Director must approve numerous documents or other electronic files. The approvals are manually routed by email. This initiative would take advantage of electronic routing and documentation of approvals in a centralized location and allow requestors to track the current status of the approval request.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issues Addressed: <i>Critical: A1</i></p>	 High
R	<p>Upgrade ArcGIS Desktop to an Esri-supported version. The RCD is currently using ArcGIS Desktop version 10.2.1. This version has been retired by Esri and is no longer supported. This initiative would entail upgrading all RCD ArcGIS Desktop installations to at least ArcGIS Desktop 10.5 and training users to utilize personal geodatabases for more efficient cartography within the RCD.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issues Addressed: <i>High: T8</i></p>	 High

Prioritized List of IT Projects and Initiatives – Detailed		
ID	Project/Initiative Description	Priority
A	<p>Upgrade all AutoCAD Civil 3D users to the newest stable version. Staff reported a desire to upgrade AutoCAD Civil 3D, but lacked the administrative rights to perform the upgrade. In order to perform the upgrade, the RCD should first determine administrative access needs and assign them. Subsequently, the RCD should work with the software vendor and contracted third-party IT support to plan for and implement the upgrade to the newest stable version. Upgrade considerations should include defining requirements, resource planning, user acceptance testing, training, and go-live support.</p> <p>Department Referencing Initiative: <i>BerryDunn</i> Strategic IT Issue Addressed: <i>Critical: A5</i></p>	
F	<p>Identify and implement a process or system solution for project and grant management. RCD staff reported that a system does not exist to manage projects and grants. Staff reported that project and grant documents are stored in multiple locations, creating inefficiencies in the management, tracking, and storage of documents. This makes it difficult for staff to effectively manage and report on projects and grants. This initiative would assess and define RCD's needs and develop a strategy to either utilize an existing application such as SPO, or to procure a new project and grant management system.</p> <p>Source of Project/Initiative: <i>BerryDunn</i> Strategic IT Issue Addressed: <i>Critical: A1</i> <i>High: A3, A6, T4</i></p>	
K	<p>Create an inventory of applications and conduct a gap analysis of system(s) functionality related to diversity, equity, and inclusion. Staff reported an interest in more technology-related diversity, equity, and inclusion activities (e.g., language translation technology). One particular example is the ability to translate marketing and education content into Spanish, accommodating Spanish-speaking recipients of such content. This initiative would include further defining how the RCD would like to incorporate diversity, equity, and inclusion in its activities. Once the goals have been defined, current applications would be assessed to determine if these goals can be met. If not, the analysis would also define what technology would be needed to meet RCD's diversity, equity, and inclusion goals.</p> <p>Department Referencing Initiative: <i>BerryDunn</i> Strategic IT Issues Addressed: <i>Medium: M4</i></p>	

Prioritized List of IT Projects and Initiatives – Detailed		
ID	Project/Initiative Description	Priority
E	<p>Implement a technology-training program. Staff reported that there is a lack of technology training that is tailored to RCD technology end-users. Topics include software training, best practices, and security. Technology training is important both for onboarding new employees, as well as ongoing training for current employees as the RCD technology environment evolves over time. RCD could benefit from developing and implementing a technology-training program that creates a framework for identifying and implementing training opportunities. The technology-training framework should include ongoing end-user training, and a training schedule for both new and existing staff to develop a culture of learning and continuous improvement at the RCD with a clear distinction of the ownership of training responsibilities.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issues Addressed: <i>Critical: M3</i></p>	 <p>High</p>
G	<p>Identify and implement a solution for customer relationship management. The RCD does not have an effective way to manage relationships with constituencies that include landowners and citizens interested in the RCD's mission. Staff reported that the current landowner database is antiquated and manual and that they do not have the ability to effectively manage communications with landowners. This initiative would assess and define the RCD's needs in order to procure and implement a customer relationship management application or identify and implement existing MS365 application functionality to meet those needs.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issue Addressed: <i>Critical: A8</i> <i>High: A10, M8</i></p>	 <p>Medium</p>
N	<p>Identify and implement opportunities for cost savings in license, hardware, and technology services expenditures by utilizing state contract and other cooperative purchase agreement discounts. Staff reported that software licenses are purchased through Wooden Spoon or directly from the provider without taking advantage of state contract or cooperative purchasing agreement pricing. This initiative would seek to take advantage of such reduced pricing for software programs and other technology services.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issues Addressed: <i>High: A11</i> <i>Medium: M6</i></p>	 <p>Medium</p>

Prioritized List of IT Projects and Initiatives – Detailed		
ID	Project/Initiative Description	Priority
Q	<p>Perform a gap analysis of ArcGIS. The RCD is currently using ArcGIS Desktop. This initiative would identify gaps within the existing version of ArcGIS and identify opportunities with updating to ArcGIS Pro. Based on the result of the gap analysis, the RCD should determine if it should upgrade to ArcGIS Pro.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issues Addressed: <i>High: T8</i></p>	 <p>Medium</p>
I	<p>Conduct a hardware and software needs assessment. Staff reported that the types of hardware and software can vary among employees. This results in some staff having to use personal devices as well as using less robust software. For example, not all staff have laptops to use when working remotely, and not all staff have Adobe Acrobat. This initiative would assess the hardware and software needs of all employees to determine the gap between existing hardware and software provided to staff and what staff need to effectively and efficiently perform their job duties.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issues Addressed: <i>High: T8</i></p>	 <p>Medium</p>
O	<p>Implement a newsletter sign-up form on the RCD website. Staff reported that the newsletter recipient database is maintained manually. This project would integrate a web form on the Word Press-based website, allowing contacts to sign-up for the newsletter. Additionally, contacts wishing to remove their receipt of the newsletter could manage their contact preferences with the Constant Contact integrated form.</p> <p>Source of Project/Initiative: <i>BerryDunn</i></p> <p>Strategic IT Issues Addressed: <i>High: T2, A7</i> <i>Medium: M6</i></p>	 <p>Medium</p>