

RFP Information Technology: The Town needs a five-year technology plan, and a draft Request for Proposals is presented. Permission to issue the RFP is requested.

**TOWN OF HADLEY, MASSACHUSETTS
REQUEST FOR PROPOSALS**

INFORMATION TECHNOLOGY CONSULTANT

July 29, 2015

DRAFT FOR COMMENTS

Town of Hadley

100 Middle Street

Hadley, Massachusetts 01035

Save As: RFP (IT Consultant) c 30B

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Town of Hadley
REQUEST FOR PROPOSALS

FOR

INFORMATION TECHNOLOGY CONSULTANT
HADLEY, MA 01035

The Town of Hadley Select Board invites proposals from qualified information technology consultant to prepare a five-year technology plan. RFP specifications can be obtained at the Select Board, Town of Hadley, 100 Middle Street, Hadley, MA 01035 between the hours of 9:00 a.m. and 4:00 p.m. Monday through Friday.

Deadline for proposal submittal is _____ 2015 at 2:00 p.m. Proposals must be delivered to: Select Board, Town of Hadley, 100 Middle Street, Hadley, MA 01035.

1. General Information and Proposal Submission Requirements:

General: Proposals will be accepted during business hours (9:00 a.m. to 4:00 p.m., Monday through Friday) until the deadline of _____, 2015 at 2:00 p.m. at which time they will be opened. The official submittal time shall be measured according to the Eastern Time Zone provided by the National Institute of Standards and Technology. Proposals must be delivered to: Select Board, Town of Hadley, 100 Middle Street, Hadley, MA 01035.

2. Submission Deadline and Instructions

Qualified persons or firms are requested to submit proposals in a separate sealed envelope marked "IT NON-PRICE PROPOSAL" with the applicant's name and address on the front. Applicants should provide one (1) signed original proposal and six (6) copies. Fax or electronic submissions will not be accepted.

All non-price proposals must include a non-collusion form, tax compliance certificate, and (in the case of corporations) a certificate of corporate vote. All proposals must be signed by an authorized individual(s)

A complete and all-encompassing pricing proposal sheet is to be submitted in a separate sealed envelope marked "IT PRICE PROPOSAL". The pricing proposal sheet is to list and document any and all proposed charges for the project. Applicants should provide one (1) signed original proposal and six (6) copies. Fax or electronic submissions will not be accepted.

The Select Board are the awarding authority and reserve the right to reject any and all proposals or parts of proposals; to waive any defects, information, and minor irregularities; to accept

exceptions to these specifications; and to award contracts or to cancel this RFP if it is in the Town of Hadley's best interest to do so.

Proposals must be signed as follows: a) if the proposer is an individual, by her/him personally; b) if the proposer is a partnership, by the name of the partnership, followed by the signature of each general partner; and c) if the proposer is a corporation, by the authorized officer, whose signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed.

All sealed proposals must be received and registered by the Town Administrator's office by _____, 2015 at 2:00 p.m. All outer envelopes must be labeled as per above instructions and mailed or hand delivered to the following address:

Town Administrator
100 Middle Street
Hadley, MA 01035

No proposals will be accepted after the time and date noted. Late delivery of materials due to any type of delivery system shall be cause for rejection. If on the date and time of the submittal deadline the Town Hall is closed due to an uncontrolled event such as fire, snow, ice, wind or building evacuation, the submittal deadline will be postponed until 2:00 p.m. on the next normal business day.

All proposers must submit a list of a minimum of three references, with contact information, where they are performing or have, in the last five years, performed similar services.

This Request for Proposals is governed by the provisions of MGL Chapter 30B Section 6.

The contract will be awarded within thirty (30) days after the proposal opening. The time for award may be extended for up to 45 additional days by mutual agreement between the Town and the apparent lowest responsive and responsible proposer.

If any changes are to be made to this Request for Proposals (RFP), an addendum will be issued. Addenda will be mailed or faxed to all interested parties on record as having picked up the RFP.

Questions: Questions concerning this RFP must be submitted in writing to: David Nixon, Town Administrator, 100 Middle Street, Hadley, MA 01035 before 4:00 p.m. on _____, 2015. Questions may be delivered, mailed, faxed (413-586-5661), or emailed (admin@hadley.ma.org). Written responses will be mailed or faxed to all proposers on record as having picked up the RFP.

Modifications: A proposer may correct, modify, or withdraw a proposal by written notice received by the Town prior to the time and date set for the proposal opening. Proposal modifications must be submitted in duplicate in a sealed envelope clearly labeled "Modification No. ____". Each modification must be numbered in sequence, and must reference the original RFP.

After the proposal opening, a proposer may not change any provision of the proposal in a manner prejudicial to the interests of the Town or fair competition. Minor informalities will be waived or the proposer will be allowed to correct them. If a mistake and the intended proposal are clearly evident on the face of the proposal document, then the mistake will be corrected to reflect the intended correct proposal, and the proposer will be notified in writing; the proposer may not withdraw the proposal. A proposer may withdraw a proposal if a mistake is clearly evident on the face of the proposal document, but the intended correct proposal is not similarly evident.

The proposer by making a proposal represents that the proposer has read and understands the RFP documents, and that the proposal is made in accordance therewith. By submitting a proposal, the proposer represents through his or her proposal that the contract documents are sufficient in scope and detail to indicate and convey understanding of all terms and conditions for performance of the work of this contract.

The proposer shall carefully study and compare the RFP documents with each other, shall examine the site and local conditions, and shall at once report to the Town Administrator errors, inconsistencies, or ambiguities discovered.

The Town of Hadley retains the right to cancel this RFP, or to reject in whole or in part any and all proposals, and to waive any informalities in proposing, if the Town determines that cancellation or rejection serves the best interests of the Town.

All prices submitted in response to this RFP must remain firm for seventy-five (75) days following the proposal opening.

Notice Concerning Unexpected Closures: If at the time of the scheduled proposal opening, Town Hall is closed due to uncontrolled events, such as fire, snow, ice, wind, or building evacuation, the proposal opening will be postponed until 2:00 p.m. on the next normal business day. Under these circumstances, the proposals shall be opened by the Town Administrator, or his designee. Proposers will be accepted until that date and time.

Authorized Parties: A proposal must be signed as follows: 1) if the proposer is an individual, by her/him personally; 2) if the proposer is a partnership, by the name of the partnership, followed by the signature of each general partner; and 3) if the proposer is a corporation, by the authorized officer, whose signature must be attested to by the clerk/secretary of the corporation and the corporate seal affixed.

Bonding Requirements:

Section 1: Performance Bond: There are no performance bond requirements.

Section 2: Payment Bond: There are no payment bond requirements.

RFP Deposit: There are no proposal deposit requirements.

RFP Evaluation: All proposers shall be evaluated by the Select Board and the Town Administrator. The RFP will be awarded by the Select Board.

3. Project Description:

The Town of Hadley is a municipal corporation within the Commonwealth of Massachusetts having a population of 5,000. Over the past decade, the Town has acquired various technologies (hardware and software) designed to address Town-related business and functions. Such technologies include accounting software, billing and collections software, stand-alone computers for departments, and software for the Treasurer. The departmental computers are connected with a wireless network.

To keep all this equipment and these software applications running effectively requires a great deal of effort. The Town lacks an IT department and relies on outside vendors for services and maintenance.

The Town of Hadley wishes to hire a consultant(s) capable of providing the Town with a Five Year Strategic IT Project Plan. This strategic plan must include 1) a comprehensive assessment of current conditions; 2) recommended actions; 3) cost estimates; 4) prioritization of actions; and 5) an implementation plan that can be incorporated into the five-year capital plan.

For this project, the consultant shall develop a plan to interview all key personnel who utilize technology. Any personnel who make decisions on IT, use technology on a daily basis, or interact with citizens should be interviewed during this process. The consultant shall conduct interviews and visit certain positions to gain an in-depth understanding of how technology is used throughout the organization on a daily basis, and how it could more effectively assist workflow.

The project will require actively engaging key constituent groups for their input during this process. These groups are: 1) professional staff, and 2) boards and committees. This will be done through a series of interviews, surveys, and workshop-style interviews. The proposal should provide details of how the proposer will accomplish this task.

Departments to be interviewed;

- Select Board Office,
- Town Administrator
- Town Clerk,
- Town Tax Collector,
- Conservation Commission,
- Assessors' Office,
- Board of Health,
- Accountant,
- Building Inspector and Inspection Services,
- Treasurer Office,
- Fire Department,

- Police and Dispatch Department,
- Public Works,
- Library,
- Council on Aging,
- Hadley Public Access Television, and
- Representation of relevant boards and committees.

A. **Process:** The key to developing a credible strategic IT Plan will be the comprehensive effort to gather sufficient input from three constituencies of the Town: 1) Internal professional staff; 2) boards and commissions; and 3) the public.

This information will come from a series of activities including 10 surveys; 2) interviews, and 3) public forums. The data must be categorized in a logical and systematic fashion and incorporated into the strategic plan as appropriate. The results must be published as an appendix to the final report.

B. **Network Infrastructure:** The consultant must assess the current network infrastructure, including all data switches, hubs, routers, appliances, LAN wiring within the facilities, WAN cabling between facilities, and include recommendations for appropriate improvements and action steps in the final report.

C. **Telecom Infrastructure:** The consultant must assess the current telecom infrastructure and make recommendations regarding to a hybrid VOIP system which would support modern phone communications. These recommendations must be included in the final report. Please note, the expectation is not for a detailed telecom plan.

D. **Servers and Server-based Applications:** The consultant must assess the current servers being utilized and make recommendations regarding the introduction of servers or assisting the Town to transfer such functions to the cloud. The consultant shall make recommendations regarding management, maintenance, and life-cycle of such devices in the final report.

E. **Desktops:** The consultant must assess the current fleet of desktops, laptops, and workstations, operating systems, office applications, and other applications that may have unique requirements. Observations and recommendations regarding deployment, patching, updating, and upgrading, monitoring, maintenance, and life-cycle must be included in the final report.

F. **Printers:** The consultant must assess the current fleet of printers, copiers, multifunction printers, scanners, fax machines, ink-jet and large format printers/plotters. Consider printing cost, maintenance costs, and make recommendations for potential cost savings through standardization, consolidation, etc. in the final report.

G. **Storage and Back Ups:** The consultant must assess the current use of current storage practices and processes. Observations and recommendations must be including in the final report.

- H. **Web Page and Internet Access:** The consultant must assess the existing Town of Hadley web page (www.hadleyma.org) and make recommendations based on design, functionality, on-going maintenance, and content management. Functionality includes meeting agendas, calendars, meeting minutes, e-commerce, online billing, online GIS mapping, online data retrieval, online permitting, streaming audio, streaming video, blogging, podcasts, etc. Consideration must be given to time, effort, and human resources required to support such recommendations.
- I. **Document Archiving, Document Management, Document Retrieval, Records retention, and E-Mail Archiving:** The consultant must assess the Town's current capabilities with the actual needs of the Town Clerk and other departments. In addition to archiving, management, retrieval, and retention, the consultant must make recommendations and observations regarding e-mail archiving and include these in the final report.
- J. **Land Use:** The consultant must consider the work that flows between all land use offices including, but not limited to: Building Inspections, Planning Board, Conservation, Assessors, Zoning Board of Appeals, Fire Department, Public Works, and Public Safety and determine how better to utilize GIS and database technologies to aid in streamlining an online process for managing permitting processes. Observations and recommendations must be included in the final report.
- K. **E-Mail:** The consultant must assess the current utilization of Microsoft Outlook as the primary e-mail tool for town offices. Outgoing POP3 mail traffic flows through the firewall, and employees are permitted to access their web-based e-mail. The consultant must include observations and recommendations in the final report.
- L. **Social Networking (Chats, Blogs, Face Book, Twitter, etc.):** The consultant must report observations and recommendations regarding uses of social media in the municipal departments in the final report.
- M. **Collaborative Tools (SharePoint):** Currently, there is no use of SharePoint or related collaborative tools. Based on the results of the data gathered in the process described in Paragraph A, the consultant must report observations and recommendations regarding collaborative tools in the final report.
- N. **Business Continuity and Disaster Recovery:** The Town of Hadley has a continuity of operations plan as part of its emergency management program. There is no generator at Town Hall. Data are backed up nightly and stored off site. The consultant must state observations and make recommendations in the final report.
- O. **Data Security:** Currently, the Town uses several anti-virus software programs. The consultant must assess the current level of protection and make observations and recommendations in the final report.

- P. Remote Access:** Remote access is available for email and accounting software. The consultant must report recommendations in the final report.
- Q. Software Licensing:** The consultant must review the current software licensing and make recommendations that will assist the Town in reducing software licensing costs, while ensuring that we are in compliance. This section will also require recommendations in regards to migration or upgrades to newer operating systems or application suits of the adoption and implementation of low-cost or free open-source software applications.
- R. Policies and Procedures:** Since the use of technology has evolved over time, there have been few management issues in regards to the abuse of technology, and there has been little demand for the use of standardized policies and procedures to date. The level of user sophistication, the deployment of technology, and the new levels of exposure to risk no longer make this a practical business practice. The consultant must make recommendations regarding standardized IT policies and procedures in the final report.
- S. Help Desk and Reporting:** The Town has no program, such as Outlook Help Desk. The consultant must make recommendations whether to use this application.
- T. IT Staffing:** Currently, the Town of Hadley has no formal IT staffing – all IT issues are addressed through an outside vendor. Individual employees, who possess a higher degree of understanding of IT, also perform maintenance or troubleshoot IT problems. After observing the IT infrastructure and operations, and after interviewing everyone, the consultant must state observations and recommendations regarding IT staffing in the final report.
- U. IT Space Requirements:** Currently, the Town has no IT staffing or IT department. The consultant must make recommendations as to house an IT department, if one is recommended.
- V. Emerging Technologies:** Having observed the Town of Hadley’s computing environment, the consultant is expected to make general recommendations regarding the potential benefits of new or emerging technologies, or technologies that are coming down in scale or price for a small town.

Plans and Specifications: Plans and technical specifications are made an integral part of these IFB documents.

Prevailing Wages: Prevailing wages do not apply.

4. Quality Requirements

Proposers must have a minimum of five (5) years satisfactory performance in similar projects in scope and size. Proof of experience shall be determined by a review of information supplied in the list of references.

Proposals are subject to review of references and a positive determination from the evaluators of all available references.

5. Comparative Evaluation Criteria

In addition to the minimum quality requirements, each proposer will be further evaluated according the following scale:

- Highly Advantageous
- Advantageous
- Not Advantageous
- Unacceptable

The proposal must include:

1. The identity of the individual, partnership or corporation applying for contract award. If the applicant is a partnership or joint venture, the proposal should specify who will act as the lead consultant for purposes of assuming contractual responsibility. If the consultant intends to sub-contract the photography or any other work required in the scope of services, the sub-contractor must be identified.

- Highly Advantageous: The applicant has over 10 years' experience in performing information technology consulting work in Massachusetts.
- Advantageous: The applicant has 6 to 10 years' experience in performing information technology consulting work in Massachusetts.
- Not Advantageous: The applicant has 5 to 6 years' experience in performing information technology consulting work in Massachusetts.
- Unacceptable: The applicant has fewer than 5 years' experience in performing information technology consulting work.

2. A description of the consultant's plan of services to this project: methodology, demonstrated understanding of the community's needs, and the consultant's expectations of assistance and services from the town.

- Highly Advantageous: The applicant's plan of services is clearly written and demonstrates a strong understanding of the project and applies a rigorous methodological approach, and clearly discusses the consultant's expectations of assistance and services from the town.
- Advantageous: The applicant's plan of services is written with few unclear areas that touch on the applicant's understanding of the project, methodology, and expectations of the town.
- Not Advantageous: The applicant's plan of services is unclear and weak in project understanding, methodology, and expectations of the town.
- Unacceptable: The applicant's plan of services is poorly written or does not address the project, the methodology, or the expectations of the town.

3. An applicant qualifications statement, including academic and professional work experience attesting to capacity to perform the required work program. Resumes are required for all project personnel.
 - **Highly Advantageous:** The applicant's resumes demonstrate continuous involvement in the field of information technology consulting, including demonstrated experience with municipal organizations, and whose staff's resumes show continuous involvement in the field of information technology consulting and demonstrate a broad range of skills sufficient to complete the project
 - **Advantageous:** The applicant's resumes demonstrate involvement in the field of information technology consulting with brief intervals of other work and whose staff's resumes show direct involvement in consulting with brief intervals of other work.
 - **Not Advantageous:** The applicant's resumes show sporadic involvement in the field of information technology consulting and whose staff show sporadic involvement in the field of consulting.
 - **Unacceptable:** The applicant's resumes show sporadic involvement in the field of information technology consulting and whose staff shows little involvement in the field of information technology consulting.
4. Interview. The final three proposers will be invited for a short presentation and interview with the evaluation team/
 - **Highly Advantageous:** The applicant's interview was clear, well-organized, and demonstrated a strong understanding of the project.
 - **Advantageous:** The applicant's interview was clear, organized, and demonstrated an adequate understanding of the project.
 - **Not Advantageous:** The applicant's interview was not clear and not well-organized, but demonstrated an adequate understanding of the project.
 - **Unacceptable:** The applicant's interview was not clear, not well-organized and demonstrated a lack of understanding of the project.

6. Insurance

The Contractor shall be responsible to the Town or any third party for any property damage or bodily injury caused by it, any of its subcontractors, employees or agents in the performance of, or as a result of, the work under this Agreement. The Contractor, on behalf of itself and any subcontractors used, hereby certifies that the Contractor and such subcontractors are insured for workers' compensation, and claims on account of property damage, bodily injury, personal and product liability.

A certificate of insurance must be presented to the Town at the time of the award, and must name the Town as additional insured on the face of the document. Insurance requirements are:

General liability, including Bodily Injury and Property Damage - \$1,000,000 per occurrence/\$2,000,000 aggregate

Automobile Liability, including Bodily Injury and Property Damage (or combined single limit) - \$1,000,000 per occurrence

Workers' Compensation in accordance with Massachusetts laws

Professional Liability Insurance \$1,000,000 per claim (minimum)

7. Rule for Award

The contract will be awarded to the responsible and responsive vendor submitting the most advantageous proposal taking into consideration all evaluation criteria as well as price.

8. RFP Check List

- Certificate of Non-Collusion.
- Certificate as to Payment of Taxes.
- Certificate of Corporate Vote (if applicable).
- Non-Price Proposal in sealed envelope marked, "IT NON-PRICE PROPOSAL". Seven (7) copies.
- Price proposal in sealed envelope marked, "IT PRICE PROPOSAL". Seven (7) copies.
- Signature(s).
- Comprehensive list of references (with project contact names and telephone numbers) showing 5 years' experience.

PRICING SHEET

- A. **Process:** The key to developing a credible strategic IT Plan will be the comprehensive effort to gather sufficient input from three constituencies of the Town: 1) Internal professional staff; 2) boards and commissions; and 3) the public.

This information will come from a series of activities including 10 surveys; 2) interviews, and 3) public forums. The data must be categorized in a logical and systematic fashion and incorporated into the strategic plan as appropriate. The results must be published as an appendix to the final report.

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TASK PRICE: _____

TOTAL PROPOSED COST (add all items): _____

(Signature of person signing bid or bid)

(Name of Business)

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under the penalties of perjury that this bid or bid has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

(Signature of person signing bid or bid)

(Name of Business)

CERTIFICATION AS TO PAYMENT OF STATE TAXES

Pursuant to Section 49A(b) of Chapter 62C of the Massachusetts General Laws, the undersigned contractor does hereby certify, under pains and penalties of perjury, that it has complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support..

NAME OF CONTRACTOR: _____

By: _____, duly authorized.
(Signature of Authorized Representative)

Title: _____

Date: _____

CERTIFICATE OF VOTE
(Corporations Only)

At a duly authorized meeting of the Board of Directors of the

_____ held on _____ it was VOTED that
(Name of Corporation) (Date)

(Name)

(Officer)

of this company, be and hereby is authorized to execute contracts and bonds in the name and on behalf of said company, and affix its corporate seal hereto; and such execution of any contract or obligation in this company's name on its behalf by such officer under seal of the company, shall be valid and binding upon this company.

I hereby certify that I am the clerk of the above named corporation and that _____ is the duly elected officer as above of said company, and that the above vote has not been amended or rescinded and remains in full force and effect as the date of this contract.

Date

(Clerk)

Corporate
Seal

Legal Notice

Town of Hadley

REQUEST FOR PROPOSALS

FOR

INFORMATION TECHNOLOGY CONSULTANT
HADLEY, MA

The Town of Hadley Select Board invites proposals from qualified information technology consultant to prepare a five-year technology plan. RFP specifications can be obtained at the Select Board, Town of Hadley, 100 Middle Street, Hadley, MA 01035 between the hours of 9:00 a.m. and 4:00 p.m. Monday through Friday.

Deadline for proposal submittal is _____ 2015 at 2:00 p.m. Proposals must be delivered to: Select Board, Town of Hadley, 100 Middle Street, Hadley, MA 01035.

Post: _____, Hadley Town Hall

Publish: _____, and _____ Daily Hampshire Gazette
Central Register, _____

Broadcast: Channel 5 _____

Distributed: _____