



REQUEST FOR PROPOSAL

ISSUE DATE: Monday, August 22, 2022

SITE VISIT DATE: Tuesday, September 6, 2022, at 10:00 a.m.

INQUIRIES DUE DATE: Friday, September 9, 2022, at 4:00 p.m.

PROPOSAL DUE DATE: Monday, September 26, 2022, at 2:00 p.m.

RFP No. 2023-01

TITLE: Information Technology Support Services

The Town of Occoquan, referenced hereafter as the Town, is accepting proposals from qualified contractors to provide information technology support services to the Town. The Proposer shall provide the services based on the specifics in the following document.

Responses are due to the Town of Occoquan Town Hall at 314 Mill Street, Occoquan, VA, by 2:00 p.m. on Monday, September 26, 2022. Proposals by telephone will not be accepted.

All inquiries for information regarding Proposal Submission requirements or Procurement Procedures shall be directed to: **Matt Whitmoyer at (703) 491-1918 or mwhitmoyer@occoquanva.gov**. The Town shall not be responsible for verbal clarification of information provided by any party. Offerors may not rely on any oral information provided. The Town will provide written responses to questions as the only form of clarification.

Proposals shall be emailed to Matt Whitmoyer at mwhitmoyer@occoquanva.gov with "Proposal RFP#2023-01" in the subject line or shall be contained within a sealed envelope/container and clearly marked with "Proposal RFP#2023-01" and delivered/mailed to:

Town of Occoquan Town Hall
PO Box 195
314 Mill Street
Occoquan, VA 22125

The Town of Occoquan does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against any Offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by law relating to discrimination in employment.

In compliance with this Request for Proposal and all the conditions imposed herein, the undersigned offers and agrees to furnish the products and/or services in accordance with the signed Proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

Signature:

Print/Type

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I. GENERAL INFORMATION

The Town of Occoquan is a small riverfront town in Prince William County and is seeking proposals from a qualified Contractor to furnish all labor, equipment, and materials to provide information technology support services to the municipality. These services will include, but are not limited to:

- Software Support
- User Training and Support
- Hardware Support
- Network Administration
- Cybersecurity
- Planning Services
- Public Records Searches
- IT Asset Disposal

Town Background: A five-member Town Council and Mayor govern the Town of Occoquan. The Town is administered by a Town Manager who reports to the Town Council. The Town Manager directs and oversees all activities of the Town. The Town of Occoquan has a population of approximately 1,100 residents and 80 businesses. In addition, the Town has a downtown historic district that is home to a business district and includes both residential and commercial activities.

The Town of Occoquan has approximately 8 full-time employees, 7 part-time staff, and 5 volunteers working at two locations in the town that require IT support. The Town’s main IT assets are its desktop and laptop computers that run Windows 10 and 11. Town Council utilize Apple iPads. Events and the Police Department employ Apple and Android tablets and Wi-Fi hotspots for various purposes.

Current IT Assets: Interested parties please contact Matt Whitmoyer at mwhitmoyer@occoquanva.gov for a full inventory of the Town’s current IT assets.

II. SCOPE OF WORK

The Town of Occoquan desires a fully outsourced IT management provider to provide proactive planning, maintenance, support, and other IT related functions. The following details are the minimum services to be provided to the Town in the area of information technology services:

1. **Initial Assessment:** With the assistance of Town staff, review inventory of IT assets; assess system architecture and equipment for efficiency, life expectancy, capacity, etc.; and make recommendations on improving the cost effectiveness, efficiency, and overall quality of the Town's IT systems.
2. **Microsoft 365 Licensing and Support:** Manage and update the Town's Microsoft 365 licenses and procure new licenses as needed. Support Town staff with the configuration and administration of Microsoft 365 programs.
3. **End User Training:** Provide training resources for various technology as needed. Specifically, provide Town staff with Microsoft 365 application training and access to relevant resources. Other training shall be provided for common software or hardware used in a business setting and newly installed equipment. Training can be provided when requested by the Town or when a need is identified by the vendor.
4. **End User Support (On-site and Help Desk):** Provide dedicated on-site support, based on a monthly on-site support hours recommendation, to address Town-wide and/or departmental hardware and software issues. Additional onsite support may be needed for special or major projects. Provide help desk services with tracked help desk ticketing and 24/7 support, or at least during core business hours of 8 a.m. – 5 p.m. Monday-Friday.
5. **Planning:** Provide engineering, planning and design services for major system enhancements and/or upgrades to existing systems. Keep the Town up to date on new technology changes and uses that will enable the Town to increase efficiency and reduce costs. Provide such updates and relevant recommendations via an annual planning meeting and as requested. Provide installation of any new equipment resulting from recommendations, including new servers, hardware, and software. Transfer existing data when required.
6. **Cloud-Based File Storage and Related Server Services:** Manage the Town's cloud-based shared drive as well as all associated hardware, software, communications, and operating systems necessary for the quality, security, performance, availability, recoverability, and reliability of the system. Monitor the performance, backup, and capacity management services of the cloud-based file hosting service. Ensure scheduled preventive maintenance and back up for equipment is promptly performed. Develop back-up and disaster recovery plans and procedural documentation for archive backup and continuity of operations. Confidentiality of the information is vital. The selected vendor 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. All vendor employees with access to the Town network will be required to undergo fingerprint background checks at the vendor's expense, training, and be expected to maintain CJIS security standards at all times.
7. **Network Administration:** Provide installation, maintenance, monitoring, and support of network equipment including switches, firewalls, routers, VPNs, collaboration with hybrid VoIP phone system vendor, and other security devices. Manage backup and disaster recovery systems. Monitor network performance and capacity management services.
8. **Cybersecurity:** Maintain firewalls, virus and malware detection, and spam reduction programs on Town servers, email, and all other Town IT assets. Maintain email and other network backups. Execute periodic security audits, including notification of suspected breaches to the Town. Ensure

remote access in a secure environment. Assist the Police Department with specific security needs.

9. **Software and Hardware Support:** Perform basic support functions including installation and configuration of PCs, laptops, mobile devices, printers, peripherals, and office software. Diagnose and correct software and hardware issues including advanced troubleshooting, maintenance, updates of hardware and software. Assist appropriate Town staff with hardware and software purchases as needed. Assist with warranty and other technical support.
10. **Public Records Searches:** Provide assistance in public records key word searches through active and archived e-mail and network files of current and former employees. Preserve original metadata of e-mails and network files while saving contents to electronic files. Vendor must be knowledgeable in Virginia FOIA Laws.
11. **Invoicing:** Submit monthly invoices to the Town for all work performed in that period. Invoices must include a detailed description of all work performed.
12. **Computer Inventory and Disposal:** Provide annual hardware inventory reporting and proper and legal disposal of surplus electronic equipment with Town permission. Dispose of other hardware and IT assets as requested by the Town.

III. DELIVERABLES

The Town of Occoquan requests the following list of deliverables, based off the Scope of Work, from the Contractor:

Deliverable	Due
Initial Assessment and Inventory Report: The Contractor shall provide a report in accordance with the requirements laid out in subsection (a) of the Scope of Work. The report shall assess the current condition of the Town’s IT assets and list out specific changes or updates the Town and the Contractor can make to improve the cost effectiveness, efficiency, and overall quality of the Town’s IT systems.	Within 45 days of start of contract
Annual Planning Meeting and Recommendations: The Contractor shall schedule a planning meeting and submit a report to the Town outlining the Contractor’s recommendations for how the Town can improve its IT systems, including updates and changes to hardware, software, and any other IT assets.	November 31 st of each contract year
Help Desk Support and Tracking	As needed monthly
End User Training Resources: The Contractor shall make an easily accessible resource document or hub that can support frequently asked questions and issues with the software and hardware systems commonly used by Town staff.	Within 5 days of contract start
Annual Inventory Report: The report must include an inventory of current IT assets, a detailed list of new assets, and a detailed list of disposed assets.	June 30 th of each contract year
Monthly Invoices with Detailed Descriptions: The Contractor will provide an invoice(s) with detailed descriptions of all the work performed for the Town in that period.	Monthly

IV. EQUIPMENT

In coordination with Town staff and based on budget availability, the Contractor shall purchase and maintain all servers, hardware, software, and other materials and equipment necessary and required for the full, proper, and efficient conduct of the work. The equipment shall be kept in good order and repair.

V. CONTRACT AWARD CRITERIA

Evaluation of the Contractor's proposal by the Town will include consideration of:

- The Contractor's ability to meet IT requirements and needs of the Town.
- The Contractor's experience and the experience of its personnel.
- Demonstrated capabilities of the Contractor to provide IT services to similar organizations.
- Availability and compatibility of the support services offered to Town staff.
- Quoted price.
- Terms and conditions of Contract and risks and liabilities to be borne by the Town.

The Town anticipates awarding a single Contract from this solicitation to the responsible contractor whose proposal to the solicitation is most advantageous and "best value" to the Town, which may not necessarily be the proposal offering the lowest price nor receiving the highest technical score.

VI. SUBMISSION GUIDELINES

1. **Submittal Instructions:** One (1) original copy of each proposal must be submitted on the attached proposal form and received by the Town of Occoquan at the address shown on the cover page of this solicitation. Proposals must be received no later than the date and time listed on the cover page of this solicitation. Proposals in the form of telegrams or telephone will not be accepted.

Contractors shall complete and submit as their proposal, the following documents:

- a. The return of the Request for Proposal cover sheet signed and filled out as required by a representative of the Contractor authorized to bind the firm into a contract.
 - b. All addenda acknowledgements, if any, signed and filled out as required. Any addenda to this solicitation can be easily accessed on the Town of Occoquan website - www.occoquanva.gov. Contractors are responsible for checking the website frequently. Failure to acknowledge all addenda may result in the rejection of your proposal submission.
 - c. Contract pricing proposal with a breakdown of rates and fees for all services to be provided, including any additional or one-time charges.
 - d. Evidence of ability to comply with insurance requirements outlined in Section VI of this RFP.
 - e. Include any additional information the Contractor believes to be essential to a thorough evaluation of its proposal.
 - f. Include a minimum of three (3) references where similar work was performed. Include the dates when work was provided, the business name, address, and name and telephone number of the contract administrator. The Town shall have the option of checking discovered references in addition to references provided by the Contractor. The Town must be able to contact references without notification to the Contractor.
2. **Important Submittal Information:** Competitive proposals would supply all or most of the following information:
 - a. The Contractor's approach to providing IT services and its methodology for providing ongoing support.
 - b. An overview of the Contractor's support services, answering questions such as:
 - i. Is help desk support available?
 - ii. When is support available? (Indicate xx a.m. to xx p.m. and the days of the week.)
 - iii. How are charges for support structures documented and tracked?
 - iv. What does the problem response process look like? What response time goals and statistics can be provided?
 - c. The Contractor's recommendation of its services beyond the scope of the RFP that could benefit and/or may be of interest to the Town.
 3. **Procurement Schedule:** The following timetable outlines the Town's timeline for awarding a contract for its information technology support services:
 - Proposal Application Available August 22, 2022
 - On-site Visits at 10 a.m. on September 6, 2022
 - Applicant Inquires Due by September 9, 2022, at 4:00 p.m.
 - Answers to Inquiries Returned by September 16, 2022, at 4:00 p.m.
 - Submission Deadline September 26, 2022, at 2:00 p.m.
 - Proposal Evaluations, Reference Checks, and Selection October 2022
 - Contract Award Recommended to Council on November 1, 2022
 - Contract Service Begin January 2023
 2. **Inquiries and Comments Concerning Specifications:** Questions or comments concerning the specifications, contained herein must be received by the Town by 4 p.m. on September 9, 2022. Any interpretation deemed to be material in nature or that alters the scope of the goods or services being requested will be expressed in the form of a written addendum. Such addendum will be sent to all prospective offerors no later than three (3) days prior to the due date. Verbal communications will not be binding.

3. **On-Site Visit:** The on-site visit is optional for applicants. If an applicant would like to have an on-site visit to review the Town's current IT assets, this will take place on Tuesday, September 6, 2022, at 10 a.m. Applicants are asked to RSVP what time they would like to attend the on-site visit. Email Matt Whitmoyer at mwhitmoyer@occoquanva.gov to RSVP.
4. **Late Proposals:** Proposals received after the submission deadline will be returned, unopened, provided a return address is visible.
5. **Acceptance or Rejection of Proposals:** The Town reserves the right to accept or reject any or all proposals in whole or in part and to waive minor informalities in the process of awarding this contract.
6. **Competition Intended:** It is the Town's intent that the Request for Proposal permit competition. It shall be the offerors responsibility to advise the Town Manager in writing of any language, requirements, specifications, etc. or any combinations thereof, inadvertently restricts or limits the requirements stated in this RFP to a single source.
7. **Costs Incurred in Responding:** This solicitation does not commit the Town to pay any costs incurred in the preparation and submission of proposals or in making necessary studies or designs for the preparation thereof, nor to procure or contract for services.
8. **Disposition of Proposals:** All materials submitted in response to this RFP will become the property of the Town. One (1) copy of each proposal shall be retained for official files and will become a public record. These records will be available for public inspection after award of contract. It is understood that the proposal will become a part of the official file on this matter without obligation on the part of the Town except as to the disclosure restrictions contained in Section 12. "Disclosure: Trade Secrets and Proprietary Information".
9. **Disclosure-Trade Secretes and Proprietary Information:** In compliance with the Virginia Public Procurement Act (the "VPPA"), all proposals will be available for public inspection. Trade secrets and proprietary information submitted by a Contractor in connection with a procurement shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of this section prior to or upon submission of the data or other materials, and must identify the specific area or scope of data or other materials to be protected and state the reasons why protection is necessary. An all-inclusive statement that the entire proposal is proprietary is unacceptable. A statement indicating that costs are to be protected is unacceptable.

VII. GENERAL CONTRACT TERMS AND CONDITIONS

1. **Contract Term:** The first term of the contract will be from January 1, 2023, or a mutually agreed upon date, until June 30, 2024. The contract may then be renewed annually on July 1, for up to three years, if agreed upon by both parties.
2. **Laws and Regulations:** The Offerors attention is directed to the fact that all applicable Commonwealth of Virginia laws, municipal ordinances and the rules and regulations of all authorities having jurisdiction over the contract shall apply to the contract throughout, and they will be considered to be included in the contract the same as though herein written out it full.
3. **License Requirement:** All firms doing business for the Town of Occoquan are required to be licensed in accordance with the Town’s “Business, Professional, and Occupational Licensing (BPOL) Tax” Ordinance. Wholesale and retail merchants without a business location in Occoquan, VA are exempt from this requirement. Questions concerning the BPOL Tax should be directed to the Town Clerk at (703) 491-1918. The BPOL license number, if applicable, must be indicated on the pricing page of this Request for Proposal. Contractors submitting price quotes must be fully licensed to do business in Virginia.
4. **Subcontract:** The Contractor shall not subcontract any portion of the work to be done hereto except upon the prior written consent of the Town of Occoquan. Any approved subcontract shall not release the Contractor from its primary liability to perform all aspects of the contract.
5. **Non-Assignment of Contract:** The Contractor shall not assign the contract, or any portion thereof, without the advanced written permission of the Town Manager, such permission not to be unreasonably withheld.
6. **Contract Award:** The resulting contract will be issued to the bidder providing the best value. Price quotes should be listed for each individual service and broken down to a fixed monthly cost for each. The Town intends to award a contract for all identified services but reserves the right to delete any services prior to contract award.
7. **Insurance Requirement:** Any vendor or contractor engaged to perform work on Town property shall not start work until they have obtained and provided at a minimum, proof of the insurance required below. Additionally, the contractor shall not allow any subcontractor to commence work until all similar insurance required of the subcontractor has been obtained.

These certificates must be forwarded to the Town before the contract is signed.

Insurance Requirements:

Workers Compensation: Statutory Workers’ Compensation and Employers’ Liability insurance under the Commonwealth of Virginia statutory requirements.

Bodily Injury: \$2,000,000 each person
 \$2,000,000 each occurrence

Property Damage:
 Automobile: \$2,000,000 each accident
 General Liability: \$2,000,000 each accident
 \$2,000,000 each occurrence

*Notice of cancellation must be on insurance certificate- No change, cancellation, or non-renewal shall be made in any insurance coverage without a thirty-day written notice to the Town Manager. The contractor shall furnish a new certificate prior to any change or cancellation date. The failure of the contractor to deliver a new and valid certificate will result in suspension of all work and payments until the new certificate is furnished.

*The Town must be named as an additional insured. This proof must be in the form of a copy of the endorsement to your policy.

10. **Claims:** The contractor shall be responsible for resolutions of any and all damage claims resulting from operations provided. Claims made to the Town as a result of operators provided under this contract will be referred to the contractor for handling. Failure to properly respond to and resolve claims constitutes unsatisfactory performance and may result in cancellation of the contract.

VIII. ATTACHMENTS

**TRADE SECRETS/PROPRIETARY INFORMATION IDENTIFICATION
IF NO PROTECTION IS NEEDED STATE "N/A" ON THE TABLE BELOW AND SIGN.**

Trade secrets or proprietary information submitted by any Bidder/Offeror in connection with a procurement transaction shall not be subject to public disclosure under the Virginia Freedom of Information Act, however, the Bidder/Offeror must invoke the protection of §2.2-4342(F) of the Code of Virginia, in writing, prior to or upon submission of the data or other materials, and must clearly and specifically identify the data or other materials to be protected, and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by the Bidder/Offeror on the table below. If the Bidder/Offeror fails to identify any protected information on the table below, the Bidder/Offeror by return of this form, hereby releases The Town of Occoquan and all of its employees from any and all claims, damages, demands or liabilities associated with The Town of Occoquan’s release of such information, and agrees to indemnify it for all costs, expenses and attorney’s fees incurred by The Town of Occoquan as a result of any claims made by Bidder/Offeror regarding the release of such information. By submitting its bid or proposal, Bidder/Offeror understands and agrees that any language seeking protection from public disclosure, any specific documents or information, unless identified on the table below, are null and void and of no legal or binding effect on The Town of Occoquan. **The classification of line item prices, and/or total bid prices as proprietary or trade secrets is not acceptable. If, after being given reasonable time, the Bidder/Offeror refuses to withdraw such a classification designation, the bid/proposal will be rejected.**

Section/Title	Page Number(s)	Reason(s) for Withholding From Disclosure

Company Name: _____

Signature: _____

