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## *Request for Proposals*

### *Microsoft Office 365 Migration*

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ISSUED DATE: JUNE 20, 2015  
SUBMISSION DATE: JULY 2, 2015, AT 11:00 A.M. PST

To the City of Chehalis City Hall

RFP COORDINATOR:

JUDY SCHAVE, CITY CLERK  
CITY OF CHEHALIS  
350 N MARKET BOULEVARD  
CHEHALIS, WA 98532  
(360)345-1042  
JSCHAVE@CI.CHEHALIS.WA.US  
WWW.CI.CHEHALIS.WA.US

## **1. PURPOSE**

1. The City of Chehalis is seeking proposals from qualified vendors to provide Microsoft Office 365 system integration and implementation services. The scope of the project will be migrating City of Chehalis from an Exchange Server 2003 environment to an Office 365 hosted email service.
2. The awarded vendor will assist City of Chehalis in performing a readiness assessment of the existing infrastructure including gather and document requirements, developing a migration plan and executing against this plan. Vendor will provide services needed to migrate 120 mailboxes to Exchange Online with email archiving, eDiscovery, anti-malware and anti-spam filtering capabilities. The goal is to provide a seamless transition to Microsoft Office 365 Cloud architecture while maintaining secure and robust access to and from cloud services.
3. The awarded vendor will assist City of Chehalis in purchasing the Office 365 Suite Plan G3 for 120 users along with purchasing migration software to transfer current data to the cloud services.

## **2. BACKGROUND**

### **City Profile**

- Staff is not very familiar with Office 365 Exchange and will need training
- Ed Schonack, contracted IT, is in charge of the network
- Currently there are 120 network users
- We are a PC only network
- We are running multiple domain controllers with an AD version of 2003
- Each building has a server
- Buildings are connected with fiber except for two
- Backup is done onsite
- Currently there are no applications running in the Exchange environment that will need transferred
- Most servers are currently 2003

### **3. SCOPE OF WORK**

#### **The Scope of Work will include:**

A detailed technical document and solution plan, which will provide a thorough and clearly-defined plan for a seamless migration to Office 365 including a significant focus on the communication and training requirements.

#### **Office 365 Readiness Assessment, Onsite Discovery, and Planning**

- Onsite review of client systems to gather and capture information about existing infrastructure
- Identify potential challenges in this migration and pose solutions
- Recommend a solid communications and training plan for City of Chehalis users based on best practices such as: lunch and learn, web based training and on desk materials
- Networking and Naming Services Planning
- Determine required tasks for configuring network and DNS
- User Identity and Account Provisioning Planning
- Planning considerations to implement directory synchronization
- Plan for Active Directory Federation Services for use with single sign-on
- Exchange Online Planning
- Develop migration strategy
- Identify mailbox size and item counts that will be migrated to Office 365
- Determine mail-enabled applications and plan for configuration
- Conduct bandwidth assessment to calculate migration velocity for mailbox data

#### **Preparing Environment for an Office 365 Deployment**

- Implement enterprise wide training with employees through at least three forms of communication
- Prepare end user documentation on Outlook and the new Office 365 environment
- Assist with Domain Verification and Office 365 Registration
- Add and verify City of Chehalis domain name with Office 365
- Create DNS records to configure City of Chehalis domain name for use with Office 365 services
- Configure on-premises AD for directory synchronization
- Deploy and configure Active Directory Federation Services to enable single sign-on
- Exchange Online Service Configuration
- Configure email coexistence with existing server and Exchange Online
- Mailbox quotas and archival/retention policies
- Anti-spam and malware protection
- Configure client computers and end-user experience

**Migration and Cutover**

- Assign licenses to users
- Migrate and synchronize mailbox data to Exchange Online
- Update DNS to point to Office 365
- Configure Outlook Web Access and Exchange ActiveSync for mobile phones and devices where applicable
- Perform Post-migration Service Testing of Office 365 functionality

**Post Deployment Support and Office 365 Administration Training**

- Have resources on-site and able to augment City of Chehalis support staff on the week after the migration is completed
- Onsite or Webinar Training with IT Staff
- Administering Office 365 Services
- Office 365 Admin Best Practices
- Managing DirSync
- Administering Microsoft System Center
- 30 Days of Post Deployment Support
- 8 Hours of Service Desk Support to be used within a 1 Year Term

**City of Chehalis environment is as follows and accurate as of May 19, 2015:**

- Total storage (GB): **300**
- Total storage of Archive (TB): **0**
- Total licenses (mailboxes) in use: **120**
- Total amount of Mobile users: **49**
- Types of mobile devices: **Android, iPhone**
- Windows 8.1, 7 & XP
- 90% Desktops, 10% Laptops
- Approx 4 email groups

## 4. PROPONENT AND SUBMISSION REQUIREMENTS

### 4.1. MANDATORY REQUIREMENTS

- The vendor will provide and execute the Office 365 migration plan
- The migration will have to be seamless to the business, with a cutover happening on a designated weekend
- Office 365 will have to be in full production by: **October 30, 2015**
- The vendor will be responsible to setup any licensing required for this implementation
- The vendor will require a thoughtful and detailed plan around communication and training
- The vendor will provide detailed end user documentation, with screen shots and easy to read instructions, covering how to use Outlook and Office 365, lunch and learns, and web-based training

### 4.2. OTHER REQUIREMENTS

- **Overview of firm:** a brief outline of Proponent's experience along with pertinent corporate details including full legal company name; year business was established; and number of people currently employed.
- **Project and Client Management:** a detailed description of the approach and methodology for managing projects and client relationships.
- **Project Management Team:** a detailed description of the firm's project management team including skills, experience and capabilities of relevant staff.
- **Project Schedule:** a detailed breakdown of all deliverables identified in the Scope of Work including, methods, tools and timeline to complete the project.
- **Client Reference List:** provide a client list for similar projects completed in the last three years for three different clients.
- **Project Costs:** The Proponent shall provide the total fixed price for the project based on the Scope of Work.

**Any Proponent who submits a proposal will only do so if they meet the following criteria:**

- A duly authorized signing officer of the firm has signed and dated a letter by which they are agreeing to be bound by the proposal and the terms, conditions and description of services
- A declaration that the Proponent has not given, directly or indirectly, a benefit of any kind to anyone employed by, or otherwise connected with, the City of Chehalis for the purpose of receiving favorable treatment

## 5. TIMELINES

<b>Activity</b>	<b>Date and Time</b>
Issue Date of RFP	June 20, 2015
Submission Date	July 2, 2015 – 11:00 a.m.
Contract Award	By August 3, 2015

## 6. PROPOSAL EVALUATION PROCEDURE

6.1. It must be understood and accepted by any Proponent submitting a proposal that all decisions as to the degree to which a proposal meets the requirements of the RFP are solely within the judgment of the proposed evaluation committee.

6.2. Proponents must respond to this solicitation by submitting all data required herein in order for the proposal to be evaluated and considered for award. Failure to submit such data shall be sufficient cause for disqualification or a proposal from further consideration of award.

## 7. PROPOSAL CONTENT & CRITERIA

7.1. This RFP does not commit the City to pay any costs incurred by any respondents in the submission of a proposal or in making studies or designs for the preparation thereof, or for procuring or contracting for the services to be furnished under the RFP.

7.2 The City and respondent filing a proposal hereby both certify that no officer, agent or employee of the City, who has pecuniary interest in this RFP, shall participate in any manner in the preparation of this RFP or evaluation of responses to this RFP; furthermore, the respondent certifies that the proposal is made in good faith without fraud, collusion or connection of any kind with any other respondent of the same call for proposals, and that the respondent is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm.

7.3 After the proposals are opened, the City will determine a list of qualified companies and notify those companies of the City's intention to purchase migration services and Microsoft Office 365 licensing. The City reserves the right to award services on an individual basis to the lowest proposal received in order to ensure the city receives the most competitive price for service.

7.4 Any information provided to the City pursuant to this RFP is subject to public disclosure pursuant to public records law. Any information that is deemed by the Respondent to be exempt from disclosure should be plainly marked and separated from the remainder of the proposal.

## **8. PROPOSAL SUBMISSION INSTRUCTIONS**

8.1. Sealed proposals are to be addressed and delivered to:

City of Chehalis  
Judy Schave, City Clerk  
350 N Market Boulevard  
Room 101  
Chehalis, WA 98532

8.2. Proponent must submit (3) three original Proposals signed by an authorized representative in a sealed envelope and mailed or delivered to the City of Chehalis Attention: Judy Schave, City Clerk, 350 N Market Boulevard, Room101, Chehalis, Washington 98532. The outside of the envelope shall plainly identify the subject of the proposal and the name and address of the firm.

8.3. Proposals submitted by facsimile or email will not be considered.

8.4. Late submissions will be disqualified and returned unopened.

8.5. City of Chehalis will not be responsible for any costs incurred in the preparation of the Proponent's submission. Once received the submission becomes the property of City of Chehalis.

## **9. INQUIRIES**

9.1 All questions and any form of communications with City of Chehalis regarding this RFP **must** be in writing and only be directed to the RFP Contact named on the cover page of this RFP unless otherwise advised in writing from the RFP Contact. Verbal responses to enquiries are not binding on any party. The City of Chehalis may issue a response, in the form of an addendum to the RFP, if a substantive clarification is in order. The addendum will be posted on the City's website at the following URL: <http://www.ci.chehalis.wa.us>.

## **10. INVESTIGATION OF REQUIREMENTS**

10.1. The submission of a proposal for the provision of this service will be considered a representation that the Proponent has carefully investigated all conditions which may affect the delivery of the services outlined in this proposal and that the Proponent is fully informed as to the conditions which may be encountered and the volume and the quantity of the work to be performed.

## **11. ACCEPTANCE, AWARD AND REJECTION**

11.1. City of Chehalis reserves the right to terminate the process without awarding the contract.

11.2. City of Chehalis reserves the right to accept or reject any part, or all, of each proposal submission and/or not to make an award if none of the proposals received meet the requirements.

11.3. City of Chehalis may negotiate minor adjustments with the selected proponent prior to the final award of the contract.

11.4. The awarding of the contract is subject to the availability of funds for this statement of work. Should all proposals received exceed the specific budgeted funds and the highest ranked Proponent's costs are within City of Chehalis total current year budget, we reserve the right to negotiate with the highest ranked Proponent.

11.5. City of Chehalis will not be responsible in law or in equity to any proponent for any claim for losses or damages, or any other relief, arising out of the RFP process including the selection or rejection of any particular section of this proposal.

11.6. City of Chehalis interpretation of the contents of the official proposal documents shall prevail.

11.7 All proposals will become part of the public file, and subject to public disclosure, without obligation to the City.

## **12. AWARD AND EXECUTION OF CONTRACT**

City of Chehalis will provide written notice to the successful Proponent, to advise that the proposal has been accepted.

The successful firm shall be required to enter into a contract with City of Chehalis.

## **13. CONFIDENTIALITY**

The Proponent shall treat and maintain as confidential any and all information provided by City of Chehalis in connection with the RFP.

## **14. CONFLICT OF INTEREST**

The Proponent shall disclose in its proposal if (anytime thereafter that it becomes aware that) any person who is an employee, officer, or director of City of Chehalis or any person at non-arm's length from such person is or becomes an employee, officer, director, partner, controlling shareholder, Broker or advisor of the Broker. City of Chehalis reserves the right to deem any such situation a conflict of interest and sufficient grounds to preclude awarding the contract to that Proponent.

## **15. BANKRUPTCY INSOLVENCY OR CHANGE IN CONTROL**

Proponent shall notify City of Chehalis if the proponent becomes bankrupt, insolvent or undergoes a change in control after submission of its proposal but before the awarding of the contract, which event shall constitute sufficient grounds for City of Chehalis to not award the contract to that Proponent.