REQUEST FOR PROPOSAL

INFORMATION TECHNOLOGY SUPPORT SERVICES

TRANSPORTATION AUTHORITY OF MARIN

900 Fifth Ave, Suite 100
San Rafael, CA 94901

Issued October 1, 2021

Proposals Due Via Email:
October 22, 2021 - 3:00 PM

INTRODUCTION

The Transportation Authority of Marin (TAM) is soliciting proposals from qualified professional vendors for information technology (IT) support services. TAM does not have in-house IT staff and is currently using outside vendor on an as-needed basis to meet its ongoing IT maintenance and support service needs.

The qualified vendor will enable TAM to improve IT effectiveness, enhance quality of services, minimize support cost, and maximize return on all IT investment.

The following sections of the request for proposal (RFP) describe the agency background, the required services, the proposal requirements, and the evaluation process. Proposals must be submitted via email by 3:00 PM on Friday October 22, 2021.

BACKGROUND

TAM is the congestion management agency and transportation sales tax authority of Marin. It was established by Marin County voters to support transportation infrastructure projects and programs that make the County easier, cleaner and safer for all to live, work and play.

TAM has a team of 13 full-time staff and several interns/part-time, project-based employees at times. TAM's office at 900 Fifth Ave, Suite 100, San Rafael consists of a local area network of networking equipment, server, personal computers, network copiers, and network printers. An on-premise Windows Server 2012 R2 with Active Directory service provides user authentication, access permission, file sharing, print sharing, and database application. Office documents are presented by Office 365, and Adobe Acrobat DC. Both Windows 7/10 and Mac OS X operating system equipped desktop and laptop computers are supported. Current servers and computers are from Dell. Staff computers are integrated with Canon copier scanning and printing services. Current workstations are a mix of laptops and desktops but TAM plans to move to laptop only for all employees during current and future upgrade so everyone has the flexibility and can use the same workstation for in-office and remote work.

TAM's office is utilizing the Microsoft 365 Exchange Online since January 2021. Knowledge on maintenance and administrative support of electronic mail, group calendar, shared contacts, and other collaborative software tools across multiple operating system platforms is required.

The robust internal network infrastructure's connection includes IP access to the Internet and SIP trunk services. The Internet bound security is protected by layers of Cisco enterprise grade security appliance – forefront router, firewall, internal router, and network switches. An Avaya IP Office PBX integrated with SIP trunk service and voice mail server are hosted in-house. Unified communication is utilized for efficient flow of information.

Staff can access office networks and documents remotely after establishment with an enterprise-grade Cisco VPN concentrator. The remote working ability and reliability is obviously essential to TAM's operation since the COVID-19 pandemic starting in March 2020. Currently, more than 60% of TAM's work is conducted remotely. Each individual employee is in the office about 2 days each week.

TAM's public meetings have been conducted in Internet ready, Wi-Fi friendly, and a large screen projection conference room since the start of the pandemic. The office Wi-Fi service is designed with segmented VLANs for staff and guests. TAM provides convenience for public meeting attendees and onsite contractors with security in mind.

For business continuity, Microsoft Azure Cloud File Storage is utilized to sync data from the file server continuously for disaster recovery. In the case of missing files or any other data corruption, network documents are snapshot incrementally by hour during business hours to a network attached storage (NAS). Full image backup of Windows server is part of IT maintenance by cloud-based storage retaining procedure.

TAM's website is hosted at a data center which is managed by a service provider. IT support is required from staff on an as needed basis.

SERVICES REQUIRED

The following details the IT services TAM is in need for:

1. **Initial Assessment** – Compile/update inventory of all information technology related assets, assess system architecture and current processes, and make recommendations for improving TAM's IT system performance.

2. **Desktop Applications Support** - Perform basic support functions including installing PCs, laptops, smartphone applications, printers, peripherals, office automation software and finance & accounting applications; diagnosing and correcting desktop application problems, configuring laptops and desktops for standard applications, identifying, and correcting end user hardware problems, and performing advanced troubleshooting. Maintain an up-to-date inventory of all TAM computer-related hardware and software. Assist designated TAM personnel with software and hardware purchases. Provide after-hours support. Assist in the development of software/hardware policies and procedures to meet the requirements of this Request for Proposals.

3. **Server Administration Services** - Manage computer systems and networks to include complex applications, database, messaging, web and other servers and associated hardware, software, communications, operating systems necessary for the quality, security, performance, availability, recoverability, and reliability of the system. Ensure that scheduled preventive

maintenance for equipment is properly and promptly performed; maintain the maintenance records on the equipment; develop operations, administrative, and quality assurance back-up plans and procedural documentation. Setup new users and edit or remove existing users on the server. Server performance and capacity management services with reporting when specified thresholds are reached. Configuration management, including changes, upgrades, patches, etc. Support of MIP financial software and other specialized software products of TAM as it relates to the server(s) and associated hardware. Management of user logins and security. Coordinate repair and maintenance work with contracted repair vendors and ensure repairs are conducted in a timely fashion.

4. **Network Administration Services** – Scope of activity includes all TAM network equipment including switches, firewalls, routers, and other security devices. Primary installation and maintenance of printers, network copiers/scanners, etc. Primary maintenance including regular analysis, routine configuration changes, and installation of patches and upgrades. Provide alert notifications to designated TAM personnel in the event of failure. Complete proactive monitoring of network equipment including bandwidth utilization, and other performance indicators, with reporting when specified thresholds are reached. Monitor Network performance and capacity management services and network troubleshooting. Maintain network documentation and procedures.

5. **Phone System and Website Maintenance** – TAM has separate vendors for any major maintenance and/or upgrade work needed for its phone system and website. The IT team provides staff with initial troubleshooting help, identifies any technical problems, and monitors any minor administration and/or maintenance work related to the phone system and the website.

6. **Security** – Maintain virus detection programs on TAM's servers, emails and all other TAM computers and laptops. Perform security audits as requested and notify TAM personnel immediately of suspected breaches of security or instruction detection. Provide internet security by implementing industrial grade routers and firewall with monthly administrative tasks. Configure TAM's system to enable remote access in a secure environment and provide remote access administration as requested by designated TAM personnel.

7. **Strategic Planning** – Following the Initial Assessment (Step 1 above), and upon approval by TAM, engineer, plan, and design services for system enhancements, including installations and upgrades of new or existing systems. Examples include major server upgrades, storage system upgrades, redesign of backup systems, etc. Provide technical leadership for server technology issues. Make recommendations for future purchasing and technology needs. Install new servers, software and hardware, and transfer data when acquired.

PROPOSAL REQUIREMENTS

Each proposal shall provide the following information:

1. **Letter of Transmittal**:
   The Letter of Transmittal must contain the following statements and information:
   - Company name, address, telephone number(s), and website
   - Name, title, email address, and telephone number of the person(s) to contact and who are authorized to represent the firm and to whom correspondence should be directed
   - Federal and State taxpayer identification numbers of the firm
   - A brief statement of your understanding of the services to be performed and a positive commitment to provide services as specified
   - The letter must be signed by a corporate officer or person authorized to bind the vendor to the proposal and cost schedule
   - A statement indicating that the proposal and cost schedule will be valid and binding for ninety (90) days following the proposal due date, and will become part of the contract negotiated with TAM

2. **Profile:**
   The profile of the firm should include at a minimum:
   - Length of time in business
   - Length of time in providing proposed services
   - Number of clients
   - Number of clients in the public sector
   - Number of full-time employees and area of involvement: Technical Support, Programming, Consulting, Sales Support, Administrative Support
   - Location of office to service the account
   - Disadvantaged Business Enterprise (DBE) certification status, if applicable

3. **Project Staff:**
   This project staff section should identify the project manager and other key staff who will work on this contract and provide the following information for all staff who will actively work with TAM to meet its IT service needs:
   - Experience and education related to the work required on this contract
   - Role and responsibilities of each staff member assigned to the contract
   - Number of years in the industry
   - Number of years with the firm

4. **Work Plan:**
   The work plan should provide a detailed proposal that describes how required services will be provided.

- Description of the approach the firm will use in providing the services requested
- Description of how the firm is positioned to provide the services requested with a history of experience on providing similar services.

5. **Cost of Services:**
The cost of services should include hourly rate(s) for each year of the initial 3-year contract term and the 2 optional years and a not to exceed overall annual cost based on your understanding of the services required/expected for the initial contract years. Any approved equipment/software purchased by the contractor for TAM will be reimbursed and not subject to the contract limit.
- Fee schedule that includes hourly rates for proposed services and by staff
- Specify any additional charges (e.g. travel expenses)
- If applicable, any state contract rates that TAM would be able to utilize

6. **References:**
Please provide at least three references (names and current phone numbers and email addresses) from recent customers (previous three years). Include a brief description of the work associated with each reference.

PROPOSAL SUBMITTAL PROCEDURE

TAM is requesting that the proposal submitted addresses the subjects with specificity. We are looking for content, organized effort, and solution-oriented procedures to provide quality service that can guarantee a secure, smoothly operating, efficient process and an effective IT system. An electronic copy of the proposal and all its appendices (single file, pdf format) should be emailed to TAM's Accounting and Administrative Specialist Grace Zhuang at gzhuang@tam.ca.gov.

Receipt of the proposal is required by 3:00 p.m. Friday, October 22, 2021, for a proposing firm to be considered.

A virtual site or in-person site visit of TAM's office and inspection of its current IT equipment and system setup can be arranged during the week of October 11 by sending a request to Ms. Zhuang at gzhuang@tam.ca.gov.

Any questions pertaining to this RFP, the Scope of Services, or the proposal should be submitted via email to Ms. Zhuang at gzhuang@tam.ca.gov by October 15, 2020, 3:00 PM. Ms. Zhuang can also be reached by phone at (415) 226 0827.

PROPOSAL EVALUATION CRITERIA AND PROCESS

1. **Evaluation Criteria**
   A selection committee will conduct an evaluation of qualifications and will rate each submittal based upon the following criteria:
   - Approach and methodology
   - Understanding of services to be provided
   - Personnel expertise and experience
   - Satisfaction of clients/end users
   - Pricing

2. **Tentative Selection Schedule**

Deadline for Proposals	October 22, 2021
Finalists determined by Review Committee	October 29, 2021
Interview with finalists by Review Committee if necessary	Week of November 1, 2021
Notification of Selection	Week of November 8, 2021
TAM Board Approval of selected IT Team and Start of Contract Negotiations	Late November 2021

SOLICITATION DISCLAIMER

TAM reserves the right to reject any and all responses. All responses to this RFP become the property of TAM upon submission. The costs of preparing a proposal and participating in an interview are at the sole expense of the proposer.

ATTACHMENT

Attachment A: TAM Computer Inventory
Attachment B: TAM Office Server Inventory

Attachment A: TAM Computer Inventory

Purchase Date	Warranty Expire	Model	Type	CPU	OS	Memory	HDD_Total
4/10/2018	4/9/2023	Latitude 7490	Laptop	Core i7-8650U 1.9GHz	Windows 10	16 GB	256 GB SSD
4/7/2018	4/6/2023	Optiplex 7050	Desktop	Core i7-7700 3.6GHz	Windows 10	16 GB	256 GB SSD
4/10/2018	4/9/2023	Latitude 7490	Laptop	Core i7-8650U 1.9GHz	Windows 10	16 GB	256 GB SSD
4/7/2018	4/6/2023	Optiplex 7050	Desktop	Core i7-7700 3.6GHz	Windows 10	16 GB	256 GB SSD
6/6/2020	6/7/2025	Latitude 5500	Laptop	Intel Core i7-8665U, 2.11GHz	Windows 10	16 GB	256 GB SSD
4/10/2018	4/9/2023	Latitude 7490	Laptop	Core i7-8650U 1.9GHz	Windows 10	16 GB	256 GB SSD
1/16/2017	1/17/2021	Latitude E7470	Laptop	Intel Core i7-6650U (Dual Core 2.2GHz)	Windows 10	16 GB	256 GB SSD
4/7/2018	4/6/2023	Optiplex 7050	Desktop	Core i7-7700 3.6GHz	Windows 10	16 GB	256 GB SSD
4/7/2018	4/6/2023	Optiplex 7050	Desktop	Core i7-7700 3.6GHz	Windows 10	16 GB	256 GB SSD
4/7/2018	4/6/2023	Optiplex 7050	Desktop	Core i7-7700 3.6GHz	Windows 10	16 GB	256 GB SSD
1/31/2021	1/31/2026	Latitude 7410	Laptop	Intel Core i5-10310U, 1.7GHz	Windows 10	16 GB	256 GB SSD
5/4/2016	5/5/2021	Optiplex 7040	Desktop	Intel Core i5-6500 3.2GHz	Windows 10	16 GB	256 GB SSD
4/7/2018	4/6/2023	Optiplex 7050	Desktop	Core i7-7700 3.6GHz	Windows 10	16 GB	256 GB SSD
4/7/2018	4/6/2023	Optiplex 7050	Desktop	Core i7-7700 3.6GHz	Windows 10	16 GB	256 GB SSD
4/10/2018	4/9/2023	Latitude 7490	Laptop	Core i7-8650U 1.9GHz	Windows 10	16 GB	256 GB SSD
1/4/2016	1/5/2021	Latitude E7450	Laptop	Intel Core i7-5600 2.6GHz	Windows 10	8 GB	256 GB SSD
4/10/2018	4/9/2023	Latitude 7490	Laptop	Core i7-8650U 1.9GHz	Windows 10	16 GB	256 GB SSD
8/8/2017	8/9/2022	Latitude 7480	Laptop	Core i7-6600U (Dual Core, 2.6GHz)	Windows 10	16 GB	256 GB SSD
12/17/2012	12/18/2015	Latitude E6430	Laptop	Core i5-3360 2.8GHz	Windows 7 x64	8 GB	320 GB
12/17/2012	12/18/2015	Latitude E6430	Laptop	Core i5-3360 2.8GHz	Windows 7 x64	8 GB	320 GB
7/13/2015	7/14/2020	Optiplex 7020	Desktop	Intel Core i7-4790 4.6GHz	Windows 7 x64	4 GB	450 GB
11/6/2015	11/7/2020	Optiplex 9020	Desktop	Intel Core i7-4790 3.6GHz	Windows 7 x64	16 GB	250 GB
4/10/2018	4/9/2023	Latitude 7490	Laptop	Core i7-8650U 1.9GHz	Windows 10	16 GB	256 GB SSD
12/17/2012	12/18/2015	Latitude E6430	Laptop	Core i5-3360 2.8GHz	Windows 7 x64	8 GB	320 GB
3/10/2010	3/11/2013	OptiPlex 960	Desktop	Intel Core2 Duo E8500 3.16 GHz	Windows 7 x32	4 GB	160 GB

Attachment B: TAM Office Server Inventory

Description of Asset	Model	Manufacturer	Mfcr. Year
APC Smart-UPS	SMT1500RM2UC	APC	2021
APC Smart-UPS	SMT1500RM2UC	APC	2021
Avaya Digital Station	EXP MOD DGTL STA30 - PCS 02	Avaya	2014
Avaya IP 500 V2 Voice Switch	Control Unit + VCM 64 V2 700504032	Avaya	2015
Cisco 2504 Wireless Controller	AIR-CT2504-5-K9	Cisco	2013
Cisco 2911 - Internal router	Cisco2911/K9	Cisco	2015
Cisco 2911 - Internet router	Cisco2911/K9	Cisco	2015
Cisco Aironet 1042 Controller-based Access Point	AIR-LAP1042N-A-K9	Cisco	2013
Cisco Aironet 1042 Controller-based Access Point	AIR-LAP1042N-A-K9	Cisco	2013
Cisco ASA 5515x - Firewall	ASA5515-SSD120-K9	Cisco	2015
Cisco ASA 5515x - VPN	ASA5515-SSD120-K9	Cisco	2015
Cisco Catalyst 2960-24LC-S	WS-2960-24LC-S	Cisco	2013
Cisco Catalyst 2960S-48TS-S	WS-C2960S-48TS-S	Cisco	2015
Dell Server - Windows Server 2012 R2	PowerEdge R720	Dell	2014
Synology Network Attached Storage	RS3617xs NAS RackStation	Synology	2017