

Request for Quote

IT Master Plan

RFQ No. 1077

Due Date

July 24, 2018

4:00 PM EST

Rivanna Water & Sewer Authority
Rivanna Solid Waste Authority

695 Moore Creek Lane, Charlottesville, Virginia 22902-9016
Tel (434) 977-2970 • Fax (434) 293-8858



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IT Master Plan

1. PROJECT BACKGROUND AND DESCRIPTION

Rivanna Water and Sewer Authority (RWSA) is looking for a Consultant to help draft a forward seeking IT master plan. The following Scope of Work is provided to guide but not limit the Consultant Team. The Scope of Work outlined below is the minimum required. It is intended to produce an Information Technology Strategic Plan that focuses on deliberate thoughtful technologies to support RWSA for the next five years, with a focus on short term and long-term options. The goal is to assist RWSA with an overall Strategic Plan for RWSA's IT Function. The Plan should include a comprehensive IT Assessment of existing technologies used throughout the Authority and provide recommendations to help support RWSA's future technology pathway. This plan will cover all aspects of IT related activity and use at RWSA. RWSA is a regional Water and Wastewater Authority with 10 physical plant locations and a large number of remote pump stations, tanks, meters and other equipment. The sites are connected by services from several vendors including cell, landline, metro Ethernet, DSL and fiber services.

The IT department supports:

A large variety of hardware including over 70 workstations, 69 PLC's (industrial computers), over 3 dozen servers, numerous printers, tablets and laptops, An internal digital phone system (at the Moores Creek wastewater plant) with over 100 extensions, over 75 cell phones, 2 dozen laptops and about 1 dozen tablets.

A wide area network supporting over 100 internal users, over 2 dozen physical locations, over 2 dozen routers and over 50 switches. These are connected to each other and the internet via a combination of Cellular, DSL, radio, metro ethernet and fiber services from 5 different suppliers.

Major software applications for Network, workstation, servers, finance, engineering, Maintenance and Operations, administrative services, CAD and GIS services. These include ESRI GIS, Great Plains Dynamics, Allmax Antero Maintenance software, GE Proficy, Solarwinds bandwidth monitoring software and HMI SCADA software, GE Historian SCADA data storage, Ignition SCADA reporting, Laserfiche document retention software, HP Network monitoring software, Lansweeper Network inventory and helpdesk software, Windows Server, Windows 10 and Wasteworks (Solid Waste) ticketing software.

2. PROJECT SCOPE

RWSA is looking for a Consultant to help create a strategic plan that will guide us through the next five years and beyond. The process needs to involve all primary internal stakeholders and include a thorough and realistic prioritization of needs and suggested projects.

The IT Master Plan will include in-depth assessments and evaluation of RWSA's current computing/network structure. The assessment will include interviews with key department heads and staff concerning where the Authority's needs are going forward. Following the assessment there should be recommendations ranked by importance as defined from results of the assessments. The scope will be broken out into phases as follows:

Phase 1 - Hardware and software systems:

The IT master plan will review all current systems & technology environments which includes, hardware infrastructure & architecture set-up, all systems (GIS, financial, engineering, maintenance, communication systems, and SCADA systems). The underlying IT base systems such as security, anti-virus, back-up/control, base standards and consistency platforms will be reviewed as well. (A detailed review of our SCADA systems was recently completed and will be made available).

The Consultant will review, document and evaluate resources that support the services provided, existing vendor contracts, funding, and service methodology.

A report on the current assessments will be produced evaluating and highlighting current strengths and weaknesses. This report can identify some base recommendations for IT staff on IT systems and network infrastructure, security methodology. However, major recommendations should be addressed in Phase 3 once combined with results of the needs assessment from Phase 2.

Phase 2 - Needs assessment:

The Consultant will conduct interviews with key staff (across all systems mentioned in Phase 1) and department/division heads to review current user environments, but mainly to assess future/forward-looking needs from the user base. Several possible system or functional areas already identified (but not limited to) are:

- Cloud computing possibilities
- Email flexibility and scheduling
- Document/Records management (currently use Laserfiche)
- Workflow management for (A/P, payroll, maintenance work order, etc.)
- Interoperability and integrating of systems (SCADA, GIS, Financial, etc.)
- Communication needs – remote access and devices
- Asset Management (see note *)

- Manufacturing Execution Systems
- Security systems
- Business Intelligence (BI) tools

The Consultant will conduct IT specific staff reviews to assess policy & governance structure, organizational structure to ensure business and technology needs through the most appropriate service provision agreements, service resource needs (personnel, policy, or contract). Function areas to focus on (but not limited to):

- Replacement cycles (software and hardware).
- Future hardware needs
- Future system needs
- Future staffing needs and structure
- General IT procedures
- Gap analysis of Technology/Processes
- Management needs
- Cyber Risk Management Assessment & Tool

Phase 3 – 5-year master plan

Once the current assessment and future needs analysis are completed the Consultant will provide a detailed report on conclusions. Recommendations will need to be prioritized for critical IT/system needs, major systems needs based on user feedback, to the desired and less critical projects. The recommendations will need to address:

Timeline recommendations (initiation to completion)

Implementation Strategies

Risks associated with a lapse in service (if an existing service - risk factor)

Opportunity associated with implementing a new system (opportunity factor)

Costs (one time and recurring)

Phased assessment of resources needs to support 5-year recommendation (see 2 below)

This phase of the report should also identify 1) optimal resource support levels baseline (staffing, contractor, etc.) on the current assessment; and 2) over the course of the 5-year plan recommendations, what additional systems support resources will be needed.

NOTE: This plan is being developed in coordination with an Asset management master plan and needs to be fully integrated with that plan. It is possible that the selected Consultant will perform this work as a sub-contractor to the main contractor of the Asset management plan. Additionally, this plan should further the RWSA goals as stated in the recently completed Strategic plan.

3. RESPONSIBILITIES

Consultant:

The Consultant will be responsible for facilitating events, conducting interviews, gathering, quantifying, analyzing, and reporting on all information obtained throughout this process. This phase will result in a report that will document the assessment findings and categorize future needs into the major systems. Prioritizing the needs between critical through less needed criteria can be defined better with the Project Manager.

The Consultant will provide a Project Manager to establish the project plan including timeline, milestones, tasks, reports, communications plan, and manage project activities to meet project requirements.

Rivanna:

Rivanna will be responsible for making personnel, data and a list and description of future approved and planned projects, available to Consultant. Rivanna recently completed a Study of our SCADA systems and staffing. This document will be made available to the selected Consultant. Rivanna has also recently completed an overall Strategic Plan. This document will also be made available. If any confidential information is deemed necessary to be released to the awarded party, it shall be the understanding of the awarded party that these are to remain confidential. In addition, Rivanna may require a confidentiality agreement.

4. DELIVERABLES

The reports identified in Phase 1 and 2 are deliverables in draft form. A presentation of findings will be given after Phase 1 and 2 are completed during a project update. The project update will then be used for a feedback and prioritization work session.

Finalizing recommendations for Phase 3 would require supply of a draft report to the project manager. Once Phase 3 report is finalized, a combined final report with the Phase 1 and 2 deliverables will be completed and published for Management. (15 copies).

This presentation will then go into feedback for final recommendations. Deliverables to be provided include 5 copies of a detailed five-year strategic plan addressing the topics listed herein

and any others identified in the process of stakeholder discussions, as well as more general long-term projections. Deliverables will also include 5 copies of a report outlining the finding of the evaluation and recommendations for implementing the improvements identified and recommendations for RWSA's Systems (including prioritization, risk levels, time to implement, cost, etc.).

5. SOLICITATION INFORMATION & QUALIFICATIONS

Due Date for submission of requested quotes is July 24, 2018

Please submit at a minimum:

- A. The Consultant Team's experience and results with similar projects.
- B. The quality and experience of the Project Manager and key staff persons who will be working on the project
- C. The Consultant Team's demonstrated understanding of the proposed project and RWSA, and of the need for an efficient and effective approach to successfully completing the project.
- D. Consultant Team's ability to deliver a high-quality, user friendly, hard and soft IT Strategic Plan document with a competitive fee proposal and efficient schedule. Total project cost and a practical, effective approach to performing the Scope of Work will be among the major factors in selecting a Consultant Team.
- E. The Consultant Team's ability to meet RWSA's standard contract requirements.
- F. Proposed Methodology.
- G. Proposed work Plan and Timeline.
- H. A quote for the total estimated cost to complete this.
- I. Description of similar projects in scope and size, and references on those projects.

RWSA is not liable for any cost incurred by any Consultant Team prior to the award of a contract. Costs for developing proposals in response to this request are entirely the obligation of the Consultant Team and shall not be chargeable to RWSA in any manner.

RWSA will not discriminate against any interested firm or individual on the grounds of race, creed, color, sex, age, disability or national origin in the contract award. RWSA reserves the right to reject any and/or all proposals at its discretion.

REQUEST FOR QUOTE REPRESENTATIVE

All inquiries for information regarding this RFQ should be directed to:

Steven Miller, Information Systems Administrator, smiller@rivanna.org
695 Moores Creek Lane, Charlottesville, VA 22902-9016
Telephone: (434) 977-2970

DUE DATE:

RFQs will be received until **4:00 PM EST on July 24, 2018**. RFQs received after the date and time will not be accepted. RFQs may be shipped, mailed or hand delivered to 695 Moores Creek Lane, Charlottesville, VA 22902-9016. Telephoned, emailed or faxed quotes will not be accepted.

RFQs must be clearly labeled with the following information:

RFQ No. 1077

Title: IT Master Plan

RFQ Due Date: July 24, 2018

From: Name of Firm submitting RFQ

General Purchase Order Provisions

1. The Authority reserves the right to withhold payment of invoices until merchandise is received and accepted and does not waive right to deduct cash discount where applicable.
2. All prices, unless otherwise specified, should be FOB Destination - Freight Prepaid and Allowed. If shipping charges are added to the invoice the original Bill of Lading shall accompany invoice. All charges are to be prepaid.
3. If discount for prompt payment is allowed, the discount period will begin on the date of receipt of proper invoice, or material, whichever is the later.
4. Separate invoices are required for each order and each shipment. All copies shall be forwarded directly to invoice address shown. Purchase Order number shall be shown by Vendor on all related invoices, delivery memoranda, bills of lading, packages and/or correspondence.
5. Rejected supplies will be returned at Vendor's expense. The Authority's count is final and conclusive.
6. Vendor warrants that merchandise is free and clear of all liens and encumbrances, and that the sale of merchandise does not infringe on any patents, copyrights or trademarks. The Vendor further warrants that all goods and services furnished shall conform in all respects with the terms of this order, including any drawings, specifications or standards incorporated herein and that they are suitable and will perform in accordance with the purposes for which they were intended.
7. Acceptance of this order shall be limited to the terms and conditions contained herein and incorporated herein by reference. This order shall be deemed accepted upon the return of the acknowledgment of this order or the commencement of performance by Vendor, except in the event that this order was placed by the Authority in acceptance Vendor's quote, bid or proposal in which case the order is deemed accepted by both parties upon issuance of the order by the Authority. The Authority rejects any additional or inconsistent terms and conditions offered by Vendor at any time and irrespective of Authority's acceptance of or payment for Vendor's items or services. These terms and conditions constitute the entire agreement between the parties and no change to or modification of this order shall be binding upon Authority unless signed by an authorized representative of Authority's purchasing office.
8. Authority reserves the right to terminate this order, in whole or in part, for default or convenience with written notice at least 15 days prior to effective date of cancellation. Any such termination will be without liability to Authority except for completed items delivered and accepted by Authority, payment for which can be set off against any damages to Authority. Authority may require Vendor to transfer-title and deliver to Authority any or all property produced or procured by Vendor for performance of the work terminated and Vendor shall be credited with the reasonable value thereof not to exceed Vendor's cost.
9. In case of failure to deliver the goods or products in accordance with the contract terms and conditions, the Authority, after due oral and written notice, may procure the goods or products from other sources and hold the Vendor responsible for any resulting additional purchase and administrative costs.
10. The Authority shall have sole rights of ownership to any product, idea or property resulting from the performance of this contract unless otherwise agreed to in writing by both parties.
11. Neither party shall be in default for any delay or failure to perform hereunder due to causes beyond its control and without its fault or negligence, provided that any delay or failure to perform caused by the default of a supplier of the Vendor is beyond the control of both Vendor and such supplier and without the fault or negligence of either and the items to be furnished are not obtainable from other sources in sufficient time to permit Vendor to meet the delivery schedule; and provide further, that Vendor furnishes prompt written notice to Authority of the occurrence of any such cause which will or may delay Vendor's performance.
12. Whenever Vendor has knowledge that any actual or potential labor dispute is delaying or threatens to delay the timely performance of this order, Vendor shall immediately give notice thereof, including all relevant information with respect thereto, to Authority. Vendor agrees to insert the substance of this clause, including this sentence, in any purchase order to subcontract hereunder.
13. The Vendor shall agree to indemnify and save harmless the Authority and all of its officers, agents, and employees from all suits, actions or claims of any character, name and description brought for or on account of any injuries or damages received or sustained by any person, persons, or property by or from the Vendor or by or in consequence of any neglect in safeguarding the work, or through the use of unacceptable materials in the construction of improvements, or by or on account of any act or omission, neglect, misconduct or negligence of the Vendor.

14. The rights and remedies of the Authority set forth herein shall be in addition to any other rights and remedies provided in law or equity and the failure or delay by Authority to exercise any rights or remedies under this order shall not operate as a general waiver thereof.
15. This Agreement shall be governed by and construed in accordance with the laws of the Commonwealth of Virginia and of the United States of America. The Vendor shall comply with applicable federal, state and local laws and regulations.
16. The Vendor certifies that it does not, and will not during the performance of the Contract, employ illegal alien workers or otherwise violate the provisions of the federal Immigration Reform and Control Act of 1986.
17. Vendors providing goods to the Authority under this order herewith assure the Authority that they are conforming to the provision of the Civil Rights Act of 1964 as amended, as well as the Virginia Fair Employment Contracting Act of 1975 as amended, where applicable.
18. The Authority is exempt from provisions of Virginia Sales and Use Taxes and Federal Excise Taxes.
19. The Contract is governed by the applicable provisions of the Rivanna Water & Sewer Authority Purchasing Procedures, as amended.
20. It is expressly agreed that nothing under the Contract shall be subject to arbitration, and any references to arbitration are expressly deleted from the Contract Documents.
21. During the performance of this contract, the Vendor agrees that it will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability or any other basis prohibited by law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Vendor. The Vendor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause. Also, the Vendor, in all solicitations or advertisements for employees placed by or on behalf of the Vendor, will state that it is an equal opportunity employer.
22. During the performance of this contract the Vendor agrees as follows: (i) to provide a drug-free workplace for the Vendor's employees; (ii) to post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the Vendor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; and (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Vendor that the Vendor maintains a drug-free workplace. For the purposes of this paragraph, "drug-free workplace" means a site for the performance of work done in connection with the contract awarded to a Vendor in accordance with this procurement transaction, where the Vendor's employees are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
23. The Authority does not discriminate against faith-based organizations.
24. The Authority shall have the right at any time by written notice via P.O. Change Order to Vendor to make changes in the specifications, the quantity of items called for, delivery schedules, and requirements covering testing, packaging, or destination. Any claim by Vendor for adjustment under this clause shall be deemed waived unless made in writing within (10) days after receipt by Vendor of notice of such change. Price increases or extensions of time for delivery shall not be binding on the Authority unless evidenced by a P.O. Change Order issued by the Authority's Purchasing Agent.
25. The Authority may delay delivery or acceptance occasioned by causes beyond its control. Vendor shall hold such materials, equipment, supplies, services and or installations at the direction of the Authority and shall deliver them when the cause affecting the delay has been removed. The Authority shall be responsible only for Vendor's direct additional costs in holding the goods or delaying performance of this P.O. at the Authority's request. Vendor shall also be excused if delivery is delayed by unforeseen events beyond its reasonable control, provided Vendor notifies the Authority as soon as they occur. The Authority may cancel this P.O. if such delay exceeds thirty (30) days from the original delivery date. Vendor shall use its best efforts to grant preference to this P.O. over those of other customers which were placed after this P.O.
26. To the extent required by the Commonwealth of Virginia (*see e.g.* 54.1-1100 *et seq.* of the Code of Virginia) or the County of Albemarle, the Vendor shall be duly licensed to perform the services required to be delivered pursuant to this Contract.