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*Request for Proposal*

*Microsoft Office 365 Migration*

**Issued Date: Monday, December 6th, 2016**

**Submission Date: Monday, December 19th, 2016 at 2:00pm**

RFP Coordinator:

Matthew Pierce

Midvale City

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1. **Purpose**
2. Midvale City is seeking proposals from qualified vendors to provide Microsoft Office 365 system integration and implementation services. The scope of the project will be migrating Midvale City from Exchange 2003 to an Office 365 hosted email service.
3. The awarded vendor will assist Midvale City in performing a readiness assessment of the existing infrastructure including gathering and documenting requirements, developing a migration plan, and executing this plan. Vendor will provide services needed to migrate 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.

1. **PROPOSAL SUBMISSION REQUIREMENTS**
   1. Bidders must complete and submit all requirements on or before the specified time and date. The proposal must be signed by the Bidder’s authorized representative, indicating that, if selected, the Bidder will fulfill all requirements. The proposal shall remain valid for sixty (60) days following the due date.
   2. Proposals must be received at the following location, no later than **Wednesday, December, 19th, 2016 at 2:00pm:**

Midvale City Recorder  
2nd Floor Administration Office

7505 South Holden Street

Midvale, Utah 84047

* 1. Proposals that are incomplete or arrive after the deadline are deemed non-responsive and will neither be accepted nor considered.
  2. Bidders must submit **two hard copies and one electronic copy** of the proposal. Materials shall be 8½” x 11” for the hard copies. Electronic copies may be submitted on a CD or flash media.
  3. All proposals, upon submission, will become the property of the City.
  4. Submission must be in a sealed envelope with the project title and Bidder name clearly marked. **Costs must be in a separate, sealed envelope**, and included with the submission.
  5. Cost envelopes will be opened during a public bid opening on **Wednesday, December 19th at 3:00pm** **at** Midvale City Offices, located at 7505 South Holden Street. Bidders may be present during the opening, but attendance is not required.
  6. In accordance with the Utah Government Records Access and Management Act (UCA 63G-2-101 et seq.), a Bidder must submit a request to protect any proprietary information included with its proposal. Such request must provide a written claim of business confidentiality, a concise statement of reasons supporting the claim of business confidentiality, and clearly mark and delineate the proprietary information. Bidders should be aware that such requests under the Act do not guarantee confidentiality. As such, Bidders therefore assume the risk of submitting proprietary information as part of its proposal and release the City from any liability if any proprietary information is released under the Act.
  7. The City reserves the right to reject any or all submissions and to waive any informality or technicality.
  8. The City reserves the right to cancel the RFP and award at any time. The City is not liable for any expense incurred by a Bidder in preparing for and responding to this RFP.
  9. Bidders may not contact the City Recorder or the Selection Committee members. All correspondence must be sent by email to Matthew Pierce, the City’s System Administrator, at mpierce@midvale.com
  10. All submitted questions and any answers or explanations will be returned as addenda to the RFP, which will be emailed to each Bidder and posted in the Public Notice section of the City’s website:   
      <http://www.midvalecity.org/government/public-notices>

1. **FORMAT OF SUBMISSION**
   1. **Introduction to the Firm.** Provide a brief introduction, qualifications, and background of your firm.
   2. **Relevant Experience.** Provide a listing of businesses or organizations in which the proposed solution has been implemented and is still in use.
   3. **Proposed Solution.** Describe the recommended solution, including all detail regarding requirements, including but not limited to: hardware, software, programming languages, operating system, training, etc. Discuss how you would work with City staff to ensure that the City’s needs are adequately met.
   4. **Project Staff.** List the employees that will be assigned to the project, their experience and how much of their time will be allocated to the project. Include a résumé/CV for each assigned employee.
   5. **Project timeline.**  Please include an estimated timeline including milestones and tasks.
   6. **Costs.** Costs must be broken down into hardware, software licenses, installation, and ongoing maintenance costs. If proposed solution is modularized, please include costs per module. **Costs must be in a separate, sealed envelope** and included with the proposal. The sealed costs envelope will be opened after all proposals have been evaluated and ranked.
   7. **References.** Provide a name, telephone number, and website address for at least three (3) references to be contacted as to your performance on similar projects. Similar sized government agencies preferred. (approx. population 30,000)
2. **SCOPE OF WORK**
3. **The Scope of Work will include:**
4. 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 admin training requirements.
5. **Office 365 Readiness Assessment, Onsite Discovery, and Planning**
6. Onsite review of client systems to gather and capture information about existing infrastructure
7. Identify potential challenges in this migration and pose solutions
8. Recommend a solid communications and training plan for Midvale City admin users based on best practices such as; lunch and learns web based training and on desk materials.
9. Networking and Naming Services Planning
10. Determine required tasks for configuring network and DNS
11. User Identity and Account Provisioning Planning
12. Planning considerations to implement directory synchronization
13. Plan for Active Directory Federation Services for use with single sign-on
14. Exchange Online Planning
15. Develop migration strategy
16. Identify mailbox size and item counts that will be migrated to Office 365
17. Determine mail-enabled applications and plan for configuration
18. Conduct bandwidth assessment to calculate migration velocity for mailbox data

1. **Preparing Environment for an Office 365 Deployment**
2. Assist with Domain Verification and Office 365 Registration
3. Add and verify Midvale City domain name with Office 365
4. Create DNS records to configure Midvale City domain name for use with Office 365 services
5. Configure on-premises AD for directory synchronization
6. Deploy and configure Active Directory Federation Services to enable single sign-on
7. Exchange Online Service Configuration
8. Configure email coexistence with existing server and Exchange Online
9. Mailbox quotas and archival/retention policies
10. Anti-spam and malware protection
11. Train Midvale staff to configure client computers
12. **Migration and Cutover**
13. Assign licenses to users
14. Migrate and synchronize mailbox data(messages, contacts, calendar items, etc) to Exchange Online
15. Update DNS to point to Office 365
16. Configure Outlook Web Access and Exchange ActiveSync for mobile phones and devices where applicable
17. Perform Post-migration Service Testing of Office 365 functionality
18. **Midvale City Exchange environment is as follows and accurate as of 8/11/2016:**
19. Total storage (GB): **72**
20. Total storage of Archive (GB): **150**
21. Total licenses (mailboxes) in use: **150**
22. Types of devices: **Microsoft Surface Pro 3, Dell Laptop, Dell Desktop, iPad**
23. Approximate internet speeds: **30Mbps/30Mbps**
24. **MANDATORY REQUIREMENTS**
25. The vendor will provide and execute the Office 365 migration plan
26. All archive and mobile users and data will have to be included in this migration
27. The migration will have to be seamless to the business, with a cutover happening on a designated weekend
28. The vendor will provide a schedule indicating key milestones and completion date
29. The vendor will be responsible to setup any licensing required for this implementation
30. The vendor will deliver a thoughtful and detailed plan around communication and admin training
31. **TESTING**
32. After the vendor indicates that the migration has been completed, each Midvale user will be given a week to verify that each of their emails and files was successfully migrated from the server to the cloud.
33. If any problems are found during the test period, the System Administrator will notify the vendor to correct the problem.
34. After all known problems have been resolved or the end of the test period, whichever is later, the System Administrator will accept the migration plan as complete and authorize the release of the final payment to the vendor.
35. **CONTRACT REQUIREMENTS**
    1. **Written Agreement.** By submitting a proposal to the RFP, a Bidder signifies that it is willing and able to enter into a written agreement with the City to fulfill each of the terms found in the RFP.
    2. **Status Verification.** Under the Utah Immigration Accountability and Enforcement Act (UCA 63G-12-101 et seq.), any entity contracting with a public employer is required to participate in Utah’s Status Verification System. The awarded Bidder will be required to certify that it participates in the Status Verification System and complies with the Act.
    3. **Anti-Discrimination.** Each Bidder must comply with all applicable federal, state, and local laws including, but not limited to, employment laws that prohibit discrimination based on one’s race, color, sex, age, religion, national origin, disability, pregnancy, familial status, veteran status, genetic information, sexual orientation, or gender identity.
    4. **Conflict of Interest.** Each bidder must be willing to represent and warrant that none of its officers, employees, or immediate family members of its officers and employees is or has been an elected official, employee, board member, or commission member of Midvale or its affiliates who influences the RFP, selection of a Bidder, or the subsequent written agreement. Each bidder must also be willing to represent and warrant that it has not provided any compensation in any form, whether directly or indirectly, to an elected official, employee, board member, or commission member of Midvale or its affiliates who influences the RFP, selection of a Bidder, or the subsequent written agreement.
    5. **Confidentiality.** Each Bidder must be willing to guarantee the confidentiality of all files, emails, documents, and other information that is migrated or accessed in execution of their submitted proposal. Each bidder must also be willing to use reasonable precautions and processes to prevent unauthorized access, use, or disclosure of any file, email, document, or other information.
36. **SELECTION CRITERIA**
    1. Proposals received will be reviewed and graded by a committee of employees. If deemed necessary, the City may conduct interviews with top ranked Bidders to gather additional information or to request a product demonstration to facilitate the selection process.
    2. Proposals will be evaluated and ranked based on the following weighted criteria:
37. Quality of the proposed plan (25%)
38. Setup and training services (25%)
39. Previous Experience / References (25%)
40. Costs: One time setup costs (25%)

The costs in the sealed envelope will be weighted after all proposals have been evaluated and ranked based on the previous criteria.