

SAN DIEGO
WORKFORCE
PARTNERSHIP®

Request for Proposal (RFP) for:
Technology Consulting Services

RFP Issued	March 8, 2018
Respondent's Orientation	March 13, 2018
Final Day to Submit Questions	March 21, 2018
Proposals Due	March 28, 2018
Evaluation Completion	April 4, 2018
Award Announced	April 5, 2018
Contract Start Date	April 9, 2018

**Proposal must be received no later than
3:00 p.m. Pacific Daylight Time (PDT)
March 28, 2018**

ABSOLUTELY NO EXCEPTIONS

**SDWP is an equal opportunity employer and is committed to equal
opportunity in its contracting process. Auxiliary aids and services are
available upon request to individuals with disabilities.**

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1. Introduction and Scope of Work

1.1 Purpose of RFP

Since its inception, the San Diego Workforce Partnership (SDWP) has followed a traditional IT path of internally building and managing the systems infrastructure for the headquarters location and six Job Centers (See Figure 1 Current Locations). While this has served the organization in the past, the infrastructure is aging, much of the hardware/software is no longer supported and SDWP believes the model is insufficient to meet future growth or business requirements for monitoring and support, system availability, and business recovery in the event of a disaster.

Figure 1 Current Locations

Site Name	Address	City	State	Zip
SDWP	3910 University Ave Suite 400	San Diego	CA	92105
East County	924 East Main	El Cajon	CA	92021
Downtown Library	330 Park Ave	San Diego	CA	92101
North Coastal	1949 Avenida Del Oro Suite 106	Oceanside	CA	92056
North Inland	613 W. Valley Parkway Suite 220	Escondido	CA	92025
South County	1111 Bay Blvd	Chula Vista	CA	91911
South Metro	4389 Imperial Ave	San Diego	CA	92113

As effective programs are increasingly dependent on technology for service delivery, in 2017, SDWP performed a gap analysis and established a IT strategic plan for the organization. This study identified areas in need of change to meet the future business requirements of the organization, including changes to the Wide Area Network that connects the job centers with SDWP, security of the network and system devices, shortage and bandwidth of in-house skills and competencies to support system needs, limitations with the system’s recoverability in the event of a disaster, and a need to improve the maintenance and support contracts on key IT infrastructure.

Based on this analysis, the San Diego Workforce Partnership (SDWP) has approved an 18-month roadmap to transform an aging information technology infrastructure to meet the current and future needs of our workforce system (See Attachment A: Road Map). Specifically, SDWP will be:

- Replacing the existing Wide Area Network and Internet configuration to address existing challenges with degraded performance for clients and remote users accessing internally hosted business applications, lag times in routine task execution, limited ability to stream multi-media content, and inability to maintain an offsite data backup system.
- Implementing Voice Over IP telephones to provide greater flexibility and expanded features
- Transitioning servers to a Co-Location facility to provide secure, stable performance.
- Porting many of its business applications to cloud hosted platforms including 3rd party application providers, custom-built solutions on Launch Pad (a Sales Force hosted application), and file storage in Office 365
- Replacing Wi-Fi network at the HQ location and implementing Wi-Fi at select Job Center locations
- Moving to a managed services support model to gain access to a deep bench of technical expertise which can flex with our evolving network’s needs

- Designing and implementing a disaster recovery plan to protect program data and ensure business continuity
- Performing system tuning to ensure proper security protocols are in place
- Piloting a leasing vs. purchase model for hardware for increased flexibility
- Additionally, with the recent award of our Americas Job Center RFP to a single vendor and ongoing changes in program needs, SDWP is assessing existing leases and will likely transition one or more of the facilities within the coming year.

SDWP is now looking for an expert consultant to manage the implementation of the strategic roadmap, including any site moves, and ensure the changes to organization's IT infrastructure, whether physical or virtual, align with and support SDWP's current and future business goals. SDWP seeks a perspective which is not only informed by industry standards and best-practices but also reasonable given our organization's size, scope, and business requirements. SDWP seeks respondents with experience and technical skills providing IT project management and process improvement in the areas of:

- Network configuration and administration – WAN, LAN, Wifi
- Security – physical and virtual
- Telecommunications – Internet and Voice
- Transition to outsourced models, specifically Managed Services and Co-Location
- Office Re-location/site build out
- Disaster Recovery and Continuity of Operations
- IT vendor management

1.2 Scope of Work

SDWP intends to purchase consulting services for IT project management and process improvement for the duration of the calendar year to oversee key aspects of the roadmap implementation as well as concurrent site moves. The scope of work of this RFP is centered on managing multiple, complex work streams outlined in the technology roadmap in parallel with physical location shifts. Total costs for the contract that results from this RFP may not exceed \$100,000 annually. While this is the maximum amount for this project, we will be evaluating bids on their value and relative costs and strongly encourage interested bidders to propose a set of services which are below this limit.

Specifically, consulting services are required to oversee the following:

- Installation of Wi-Fi at 3 AJCC locations (procurement underway)
- Transformation of telecommunications infrastructure (procurement underway)
- Shift from in-house to managed services for network and Help Desk support (procurement process slated to start in March)
- Transition of servers to a co-location facility (procurement process slated to start in April/May)
- Potential site moves, to include site transition and or closure (in discussion)

Specific tasks under this RFP include:

- IT Project Management
 - Lead multiple strategic and continuous improvement projects simultaneously (as outlined in Section 1.1).
 - Partner with project team members and stakeholders, including vendors, to ensure timely and successful project completion.

- Support the development of project charters, plans, and schedules; manage project budgets, communication plans, project review meetings, and deliverables.
- Identify and monitor key measures to ensure project success and prepare project status reports.
- Coordinate/facilitate/support all aspects of project management in regard to key organizational, process and technology change projects to align systems and operations with business objectives.
- Serve as strategic advisor to leadership team on IT initiatives
- Process Improvement
 - Gather requirements (as related to projects in Section 1.1) define and document business processes/procedures using workflow modeling techniques.
 - Analyze large amounts of quantitative and qualitative data and recommend insights and solutions to leadership team.
 - Use data insights, process knowledge and critical thinking to identify and validate process improvement opportunities.
 - Develop business cases for strategic and continuous improvement projects.
- Communication and Change Management
 - Create and deliver stakeholder and executive level project and business case presentations.
 - Support the development of presentations that deliver succinct/concise recommendations to management team and be able to provide rationale and justifications behind the recommendations.
 - Partner with stakeholders to manage the impact of a project, including training, communication and risk management plans.
 - Ensure adoption of new tools and processes by identifying, monitoring and communicating success metrics.
 - Draft communications and partner with vendors to create and deliver updates to policies and procedures.

Deliverables shall include but not be limited to:

- Delivery of updates to the strategic roadmap, both as roll-out unfolds as well as annual refresh
- Creation and maintenance of weekly dashboard to track status of all ongoing projects and their dependencies
- Performance of technical reviews of vendor documentation, as part of ongoing roadmap implementation
- Development of business process documentation, to include IT policies and procedures
- Vendor management during transition to Managed Services, change of physical location and setup in co-location facility
- Creation of businesses cases and cost benefit analysis to support IT decision-making
- Delivery of regular briefings for SDWP IT leadership and/or larger leadership team

Please note, these are high level tasks to help inform bidders' proposal narratives and budget. Interested respondents should review the attached roadmap as well as the recent technology-related RFQ/RFPs issued by SDWP (available on our [website](#)) and propose a set deliverables to meet the objectives. Final contract Scope of Work with be based on SDWP needs, the selected bidders proposed timeline and approach (see section 2.0), and final negotiations with the selected bidder prior to contract award.

1.3 Contract Period

SDWP intends to award one contract that will begin on April 9, 2018 and end December 31, 2018

1.4 Organizational Overview & Governance

SDWP is a 501(c)(3) tax-exempt organization chartered by the County and the City of San Diego to fund job training programs in the San Diego region. The organization's primary funding is allocated by the U.S. Department of Labor (DOL) under the provisions of WIOA and is overseen under the leadership of the Workforce Development Board (WDB) and the Policy Board. For additional information on SDWP, visit workforce.org.

1.5 Eligible Applicants

For-profit and nonprofit organizations, public agencies, consortiums, and/or a collaboration of these organizations are all encouraged to apply. Consortiums, joint ventures, or collaboration of organizations with complementary skills and experience are encouraged to apply, but proposals need to clearly identify one legal entity as the prime respondent that will hold contracting responsibilities and liabilities.

1.6 Addenda to this RFP

SDWP may revise any part of this RFP and will release an addendum that will be posted on SDWP's website, workforce.org/procurement. Respondents are responsible for checking the website to remain informed about the process and any changes that may affect the RFP. If respondents have difficulty or problems accessing the website or downloading information, contact SDWP at (619) 228-2954 or procurement@workforce.org.

1.7 Right to Cancel

SDWP reserves the right to delay, amend, reissue or cancel, all or any part of this RFP at any time without prior notice. SDWP also reserves the right to modify the RFP process and timeline as necessary. This RFP does not commit SDWP to accept any proposal or execute an agreement with any bidders, nor is SDWP responsible for any costs incurred by the respondents in the preparation of responses to this RFP. SDWP reserves the right to reject any or all proposals, to accept or reject any or all items in the proposal and to award the contracts in whole or in part as is deemed to be in the best interest of SDWP. SDWP reserves the right to negotiate with any respondent after proposals are reviewed, if such action is deemed to be in the best interest of SDWP.

1.8 Submittal of Proposals

SDWP must receive proposals no later than 3:00 p.m. PST, Wednesday March 28, 2018.

PDF versions of written and signed proposals should be sent to procurement@workforce.org with the title of "Technology Consulting Services – [name of bidder] response".

Late proposals will not be accepted.

1.9 Questions and Answers about the RFP

All questions about this RFP must be submitted in writing to procurement@workforce.org with the name of the RFP in the subject line. The final day to submit questions will be on March 21, 2018 at 3pm PDT. Questions received after that time will not be answered.

All questions and answers will be posted online at <http://workforce.org/procurement>. SDWP will respond to all questions no later than March 23rd, 2018.

2. Proposal Submission

Section	Section Title	Page Limit(s)
2.1	Cover Page	1 Page
2.2	Proposal Narrative	10 pages
2.3	Project Budget	1 Page

2.1 Cover Page

Include company name, address, phone number, website and federal tax identification number, as well as the name, phone number, email, and electronic signature for the person authorized to negotiate the contract and make decisions for the organization.

2.2 Proposal Narrative

The written narrative portion of the RFP cannot exceed 10 double-spaced pages. Content beyond the 10-page limit will be removed before proposals are evaluated. Proposals that do not include a proposal narrative will be disqualified and will not be considered for funding.

Respondents must address the following sections in the proposal narrative:

2.2.1 Organizational Qualifications and Project Management (20 points)

- Please provide an overview of your organization and your organizations experience and qualifications for similar sized projects.
- Please describe the experience and qualifications of the project lead/project manager and other key members of the project team.

2.2.2 Project Approach (30 points)

- Please outline your project management approach including how you will address competing timelines and inter-project dependencies.
- Please provide a concise timeline with key milestones and roles of responsibilities of contractor and SDWP to achieve each milestone.
- Please describe your process for gathering stakeholder input and managing differing perspectives.
- Please describe your experiences managing the following: transitions from in-house IT support to managed services, site ramp up/down, transformation of telecommunications structures and Wi-Fi installations.
- Please describe your experience managing external vendors against tight deadlines.

- Please provide specific risks you see related to this project and how your organization with manage/mitigate these risks through your project management approach.

2.2.3 Relevant Qualifications and References (20 points)

- Please describe projects where your organization has performed a similar scope of work for other clients.
- Please provide at least three references including an overview of the work performed and contact information.

2.3 Project Budget (30 Points)

Please provide a clear and concise budget that includes fully loaded hourly rates and # of hours for each staff member involved in the project by deliverable.

3. Evaluation Criteria and Contract Award

3.1 Evaluation Criteria and Access to Evaluation Information

An RFP Scoring Panel will score and rank proposals and make a recommendation for funding. The selection will be based upon proposal information supplied by the respondent in response to this RFP.

The following details the points assigned per section:

Proposal Section	Point Value
2.2.1 Organizational Qualifications and Project Management	20
2.2.2 Project Approach	30
2.2.3 Relevant Qualifications and References	20
2.3 Project Budget	30
Total Points	100

3.2 Contract Award

The RFP Scoring Panel’s recommendations will be finalized, and all bidders will be notified of the results by April 5, 2018.

3.2.1 Negotiation/Contract

The respondent’s designated authorized negotiator must be empowered to make binding commitments for the successful respondent and its subcontractors, if any. SDWP reserves the right to negotiate the final terms of the contract agreements with the successful respondent(s). Items that may be negotiated include, but are not limited to, the scope of work, the implementation schedule, and the final award amount. If any respondent recommended for funding fails to provide services outlined in the agreement and proposal, SDWP may use an alternate respondent to perform services upon board approval.

3.2.2 This project is investment in SDWP's infrastructure and operations (i.e. – is not a programmatic funding contract to a subrecipient). Per SDWP's approved signature authority guidelines approved by the Board on [February 18, 2016](#), such investments, if included in a budget previously approved by the WDB and Policy Board, does not require separate board approval.

3.3 Conflict of Interest

A completed [Conflict of Interest Disclosure Form – Attachment E](#) must be submitted even if there are no actual or potential conflicts of interest.

3.3.1 Cooling Off Period

SDWP, the WDB and the Policy Board shall not approve or contract with, and will reject any bid or proposal submitted by an individual or entity who within the preceding twelve (12) months was themselves or employs anyone who is a current, dismissed, separated, or formerly employed person of SDWP, and:

- a) Was employed in any position(s) of substantial responsibility in the area of service to be performed by the contract; or
- b) Participated in any way in the negotiations, transactions, planning, arrangements, or any part of the decision-making process relevant to the proposed contract/service agreement, or was or is employed in a role of substantial responsibility in the same general subject area as the proposed contract; or
- c) Is an owner, officer, principal, partner, or major shareholder of the proposed subrecipient.

This prohibition will apply to any qualified person(s) leaving the employ of SDWP, and will apply at all times during the twelve-month period beginning on the date the person left the employment of SDWP, and will apply to any procurement issued or contract executed within that twelve-month period. Potential respondents must detail any Cooling Off Period disclosures on the [Conflict of Interest Disclosure Form - Attachment E](#). The Policy Board may, upon a showing of special circumstances that would justify the approval of such a contract, waive this cooling off provision.

3.4 General Provisions

3.4.1 Contract Terms, Insurance and Litigation Warranty

The RFP, any addenda, and the respondent's response shall also become part of the contract agreement between SDWP and the respondent. The respondent shall indicate in its proposal any exceptions that the respondent takes to the terms and conditions in the [Contract General Provisions – Attachment](#) or to any of the contents of this RFP. Contract terms required by the respondent must be included or attached to the respondent's proposal.

Respondents, by submitting a proposal, warrant that they are not currently involved in litigation or arbitration concerning their performance as it relates to the same or similar services to be

supplied pursuant to the referenced contract and that no judgments or awards have been made against the respondents on the basis of their performance in supplying the same or similar services, unless such fact is disclosed to SDWP in the proposal(s).

Disclosure of litigation will not automatically disqualify the respondents; however, SDWP reserves the right to evaluate proposals) based on facts surrounding such litigation or arbitration.

3.5 Appeal Process

Only respondents to this RFP may appeal the results if the procurement process was violated in some manner, and/or Federal, State, and/or SDWP procurement guidelines have been violated. An appeal will not be allowed to contest individual scores, the rating system, disqualification, or dissatisfaction with the evaluation results.

The appeal process is:

- A written letter of appeal will be sent to procurement@workforce.org including:
 - evidence for appeal and the specific relief sought.
- The written appeal must be received by SDWP within five business days from the date the RFP recommendation is posted on SDWP's website.
- An appeal review panel appointed by the WDB Chair will review the appeal.
- The panel will review the appeal and collect information. At their discretion, the panel may request a meeting with the respondent and SDWP staff, and/or use other methods to gather relevant information.
- Once all the information is gathered and reviewed, the panel will issue a written decision to the appellant and the WDB.
- The decision of the appeal review panel will be final.

3.6 Restriction on Disclosure

Confidential information: Any information deemed confidential or proprietary by respondent must be clearly marked and identified by respondent as such and include an explanation of why such information is exempt from disclosure under applicable law.

Such identified confidential or proprietary information will be protected and treated with confidentiality to the extent permitted by law. Information not protected from disclosure by law will be considered a public record.

If respondent does not mark information as confidential or proprietary, SDWP will treat the information as public. All sections of the proposal including attachments are subject to release.

Proposals will be received, maintained and disclosed to the public consistent with the California Public Records Act and the Freedom of Information Act. Proposals will be exempt from disclosure until the evaluation and selection process has been completed. Respondents should be aware that SDWP is required by law to make its records available for public inspection and copying, with certain exceptions (see California Public Records Act, California Government code §§6250 et.seq. and the Freedom of Information Act, 5 U.S.C. §552).

SDWP will not notify respondent of requests for release of information or that SDWP released data unless SDWP receives a request for information previously marked and identified by

respondent as confidential or proprietary. If SDWP receives a request for release of such previously marked and identified confidential or proprietary information, SDWP will notify respondent of such request to allow respondent to challenge such request consistent with applicable law.

Respondent, by submission of materials marked confidential or proprietary, expressly acknowledges and agrees that neither SDWP nor the City or County of San Diego will have any obligation or liability to the respondent in the event a court of competent jurisdiction compels the disclosure of these materials.

Any data to be returned should be so marked by respondent and will be returned if not essential to the proposal or contract record.