



Contract 3731P

Consulting Services for Migration to Office 2007/Vista

1. Introduction

The City of Richmond proposes to engage the services of a Project Management Consultant to develop a detailed project plan to upgrade its current computing environment to Microsoft Office 2007/Vista and lead the City IT Project Team through all major phases of the upgrade for 100 workstations (the “Project”).

The objective of this request for proposal is to provide the City with qualified proponents capable of carrying out the work herein defined. The subsequent proponent submissions will form the basis for evaluation, interview and selection.

2. Submission Details

Three (3) copies of proposals marked “**Migration to Office 2007/Vista - Contract 3731P**” addressed to the Purchasing Section, will be received at the Information Counter, Main Floor, Richmond City Hall, 6911 No. 3 Road, Richmond BC V6Y 2C1, until 12:00 Noon local time, Tuesday, August 18th, 2009. Submissions received after this time will be returned to the sender.

The City reserves the right to cancel this Request for Proposal for any reason without any liability to any proponent or to waive irregularities at their own discretion.

Proposals may be withdrawn by written notice only provided such notice is received at the office of the City’s Purchasing Section prior to the date/time set as the closing time for receiving proposals.

Proposals shall be open for acceptance for 90 days following the submission closing date.

All proposals will remain confidential, subject to the Freedom of Information and Privacy Act.

Any interpretation of, additions to, deletions from, or any other corrections to the Proposal document, will be issued as written addenda by the City of Richmond. It is the sole responsibility of the potential Bidders to check with the City of Richmond’s Website, and / or BC Bid to ensure that all available information has been received prior to submitting a bid.

Except as expressly and specifically permitted in these instructions, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in the RFP, and by submitting a proposal each proponent shall be deemed to have agreed that it has no claim.

3. Enquiries

3.1 Clarification of terms and conditions of the proposal process shall be directed to:

Purchasing

Sumita Dosanjh
Buyer II - Contracting Specialist
Purchasing Section
City of Richmond

Telephone: 604-276-4097
E-mail: purchasing@richmond.ca

3.2 Technical clarification shall be directed to:

Technical

Maarten Veerman
Manager, ICT Infrastructure
Information Technology
City of Richmond

Telephone: 604-276-4318
E-mail: mveerman@richmond.ca

The City, its agents and employees shall not be responsible for any information given by way of verbal communication.

Any questions that are received by City of Richmond Staff that affect the Proposal Process will be issued as addenda by the City of Richmond.

4. Project Background

The City is undertaking a large Project to upgrade its current computing environment Office 2000 and Windows 2000/Windows XP to Office 2007 and Windows Vista environment. A pilot group of 100 workstations will be upgraded and tested with the new software.

The project plan is required to address all aspects of this upgrade, from Enterprise applications to “Line-Of-Business” applications to Desktop applications. Some of the conversion work has been identified and is already underway. Other work, such as user training or testing program, has not yet started.

The objectives for this Project include but are not limited to:

1. Office 2007 Macros & Templates
2. Group Policies & Resource Mapping
3. Training: Staff & Users
4. Enterprise Application Upgrades
5. Line-Of-Business Application Upgrades
6. Desktop Application Upgrades
7. Testing & User Engagement
8. Application Software Packaging & Deployment
9. Communications
10. Specifications
11. Product Build
12. Documentation & Change Control
13. Rollout

Once the pilot program has been completed and evaluated, the City will determine whether to continue with the upgrade, or attempt to migrate to an alternate environment.

The project team, led by the Consultant, will consist of a cross-section of Information Technology staff, as well as 100 City staff from other departments to do advanced testing.

5. Project Scope

Consultant Duties

5.1) Overall Responsibilities

The Consultant shall lead the Information Technology Project Team through all major phases of the Project. The Consultant shall complete the deliverables as outlined. The Consultant shall work primarily with the users from Information Technology, as well as test users from the City.

It is expected that until the Project is into its execution phase, the level of activity will require a minimum of four days per week. After that, activity may taper to two to three days per week, and then ramp up as the project closes.

The Project work will commence immediately on award of the contract. It is anticipated that the hours required will approximate the following schedule:

- planning: four weeks - 4 days per week
- execution: six weeks - 3 days per week
- testing: eight weeks - 2 days per week
- closing: one week - 4 days per week

It is anticipated, based on current time lines, that the project will conclude in April 2010. There may be some staff availability challenges preceding and during the 2010 Winter Olympics.

5.2) Specific Duties

- a) Review and refine the project charter;
- b) Develop and document the project plan with the project team;
- c) Conduct weekly project meetings;
- d) Assist project team with developing individual task plans;
- e) Monitor project execution and provide regular management updates;
- f) Assist project staff in identifying roadblocks and gaps;
- g) Develop evaluation criteria with stakeholders;
- h) Prepare final report and recommendations based on evaluation.

5.3) Minimum Deliverables

- a) Project charter document;
- b) Detailed project plan;
- c) Document individual task plans;
- d) Weekly status updates (may be changed to bi-weekly);
- e) Close-Out report, with recommendations.

5.4) Qualifications

The Consultant should be certified as a PMP by the Project Management Institute.

The Consultant should have at least Foundation level of ITIL certification.

5.5) The Consultant shall be responsible for any additional requirements identified during the engagement

6. City Provided Items

The City will provide a workstation with a telephone, desktop computer, appropriate computer software and network connection. Any other office supplies or equipment will be the responsibility of the Consultant.

7. Proposal Submissions

All proponents are required to provide the following information with their submissions, and in the order that follows:

- A Corporate profile of their firm outlining its history, philosophy and target market.
- A detailed listing of Project Management experience.
- A description of the consultant's understanding of the project objectives/outcomes and vision, and how these will be achieved.
- A detailed project methodology explaining each project task including what will be expected of both the consultant and the City with respect to each task.
- Team Composition – a complete listing of all key personnel who will be assigned to this project. This will include their relevant experience, qualifications for this project, roles and responsibilities, leadership, etc., in addition to their availability for this project.
- A detailed proposal of what will be delivered, including the expected outcome and benefits to the City of Richmond.
- A complete definition of the process that will be employed to meet the objectives of this project, e.g., approach to be taken, feasibility and market study, etc.
- A detailed schedule of all activities, including milestones, project meetings, interim reports and progress reports required for this project.
- Provision of a priced methodology complete with a time allotment for each identified task you propose to employ to carry out the work, this shall form the basis for payments to the successful proponent. Supplement this with a schedule of fees for staff to be assigned to the project. These rates shall be the basis for adjustments to the value of the contract in the event the scope of work varies from that proposed.
- A minimum of three (3) client references from projects of a similar size and scope.

8. Working Agreement

The successful proponent will enter into a contract for services with the City based upon the information contained in this request for proposal and the successful proponents submission and any modifications thereto.

Proponents may include their standard terms of engagement.

9. Evaluation Criteria

Proposals shall be evaluated to determine the best value offered to the City against conformance to the following criteria:

- Understanding of project objectives/outcomes and vision
- Project Methodology
- Team Composition – Experience and Qualifications of those staff to be assigned to the project.
- Project Deliverables
- Value for Money
- References (Municipal references preferred)
- Interview (if required)



City of Richmond
Business & Financial Services Department

Notice of No Bid

Note: Receipt of this completed form will assist us in calling for future bids. Please complete and submit this form prior to the closing date and time as shown on the Request for Quotation/Proposal/Tender form.
Please remember to include Quotation/Proposal/Tender No. at right.

Quotation/Proposal/Tender No.
3731P

A Quotation/Proposal/Tender is not being submitted for the following reason(s):

- | | |
|--|--|
| <input type="checkbox"/> We do not manufacture/supply the required goods/services | <input type="checkbox"/> Cannot obtain raw materials/goods in time to meet delivery requirements |
| <input type="checkbox"/> We do not manufacture/supply to stated specifications | <input type="checkbox"/> Cannot meet delivery requirements |
| <input type="checkbox"/> Specifications are not sufficiently defined | <input type="checkbox"/> Cannot quote/tender a firm price at this time |
| <input type="checkbox"/> Insufficient information to prepare quote/proposal/tender | <input type="checkbox"/> Insufficient time to prepare quote/tender. |
| <input type="checkbox"/> Quantity too small | <input type="checkbox"/> We are unable to competitively quote/tender at this time. |
| <input type="checkbox"/> Quantity too large | <input type="checkbox"/> We do not have facilities to handle this requirement |
| <input type="checkbox"/> Quantity beyond our production capacity | <input type="checkbox"/> Licensing restrictions (please explain) |
| <input type="checkbox"/> Cannot meet packaging requirements | <input type="checkbox"/> Agreements with distributors/dealers do not permit us to sell directly. |
| <input type="checkbox"/> Cannot handle due to present plant loading | <input type="checkbox"/> Other reasons or additional comments (please explain below) |

I / We wish to quote / tender on similar goods / services in future <input type="checkbox"/> Yes <input type="checkbox"/> No	Authorized Company Official – Signature and Title	Date
This space for City of Richmond Comments		Firm Name
		Address
		City
		Province Postal Code
		Telephone Number



Richmond
3731P
for Proposal Migration to Vista/Office97

City of Richmond

Agreement

This Agreement dated the ☼ day of July, 2009, at the City of Richmond, in the Province of British Columbia

Between:

City of Richmond
6911 No. 3 Road
Richmond, BC
V6Y 2C1

(the "City")

And:

☼

(the "Consultant")

Whereas:

- A. The City is ☼ (the "Event or Project");
- B. The City requires a ☼ the Event or Project;
- C. The City issued a Request for Quotation☼ for the supply and delivery of ☼;
- D. The Consultant is willing and prepared to deliver ☼;

NOW THEREFORE in consideration of the mutual covenants and agreements set out below, the parties covenant and agree as follows:

1. Responsibilities and Duties

1.1. The Consultant shall be responsible for the following as per Request for Quotation☼/Proposal ☼ and the Consultant's submission dated ☼.

- a) ☼
- b) ☼
- c) ☼

- d) ✖
- e) ✖
- f) ✖
- g) ✖
- h) ✖

1.2. The Consultant agrees to conduct himself professionally and with integrity so as not to embarrass or discredit the City throughout the performance of the duties and responsibilities set out in this agreement.

2. Compensation

2.1. In exchange for carrying out the duties and responsibilities set out in this agreement, the City agrees to pay to the Consultant, the amount of \$✖ plus GST per ✖ for the duration of the term of this agreement, but total amount of payments not to exceed \$✖ plus GST.

2.2. Once per month, commencing no sooner than ✖, the Consultant shall submit to the City a written statement of account and setting out a detailed summary of hours worked, meetings attended and the status of ✖ (the "Statement of Account").

2.3. The Statement of Account must show the amount of GST charged and include the Consultant's GST registration number and City Purchase Order number.

2.4. The City agrees to make payments to the Consultant within ten (10) working days of receipt of the Consultant's Statement of Account.

2.5. The Consultant shall, on a monthly basis, submit to the City a list of expenses incurred in carrying out the duties and responsibilities set out in this agreement and, upon approval of such expenses by the City, the City will reimburse the Consultant for such expenses.

3. Performance Standards

3.1. The Consultant is responsible for meeting the following ✖ targets:

✖

3.2. The Consultant agrees to comply with following project deadlines:

✖

3.3. The Consultant shall prepare a report to the City on a monthly basis indicating ✖ what targets have been met over the preceding month and the status of efforts in relation to the targets set out.

4. Benefits

- 4.1. The Consultant hereby waives all rights, claims, and entitlements whatsoever afforded to employees of the City pursuant to the Group Life Insurance Plan, Long Term Disability Plan and the Dental Plan and any other such benefits. The Consultant agrees to pay, as required by Federal or Provincial Statutes any payments for Income Tax, Workers Compensation, Unemployment Insurance, Canada Pension Plan, Superannuation and other such payments.

5. Independent Contractor

- 5.1. The Consultant is an independent contractor and no agency, joint venture, association, partnership, employer-employee relationship is created between the City and the Consultant.

6. Assignment And Subcontracting

- 6.1. The Consultant will not, without the prior written consent of the City, assign, either directly or indirectly, any right or obligation of the Consultant under this agreement.
- 6.2. No sub-contract entered into by the Consultant will relieve the Consultant from any of his obligations or impose any obligation or liability upon the City to any such sub-contractor.

7. Indemnity

- 7.1. The Consultant agrees to indemnify and hold harmless the City, its agents, employees, and elected officials, against any damages, liabilities, or costs, including reasonable attorney fees and defence costs, arising from or allegedly arising from or in any way connected with any act or omission by the Consultant, his employees, officers, volunteers, servants, or agents, or persons for whom the Consultant has assumed responsibility, in the performance or purported performance of this agreement.

8. Insurance

- 8.1. The Consultant shall, at his own expense, carry and keep in force during the term of this agreement, the following coverage.
- a) Professional liability insurance with a minimum limit of \$250,000.00 for each occurrence and \$500,000.00 aggregate.
 - b) Comprehensive general liability insurance with a minimum limit of \$2,000,000 per occurrence with a cross-liability clause.
- 8.2. The City may require a dedicated limit of the Consultant's professional liability policy be allocated to cover the Consultant's work while contracted by the City.

- 8.3. The City shall be added as an additional insured under the Consultant's comprehensive general liability insurance.
- 8.4. All insurance policies shall provide that they cannot be cancelled, lapsed or materially changed without at least 30 days' notice to the City.
- 8.5. Prior to the commencement of the services hereunder, the Consultant shall file with the City a copy of each insurance policy and certificate required. All such insurance shall be maintained until final completion of the service.

9. Representation

- 9.1. The parties hereto agree that for all purposes hereunder the City shall be represented by the ☒.

10. Ownership of Products

- 10.1. The City shall take title to and ownership of all materials and products developed by the Consultant pursuant to this agreement, including reports, drawings, schematics, computer files, and designs developed, except those covered by copyright. All materials and products produced shall be provided to the City upon expiry of this agreement.

11. Confidentiality

- 11.1. The Consultant shall not disclose any information provided by the City, specifically proprietary, sensitive, personal or confidential information or that developed resulting through the performance of this agreement to any other party without the express written consent of the City. All information provided to the Consultant or developed by the Consultant pursuant to this agreement shall be returned to the City upon the expiration of this agreement. The Consultant acknowledges that the City is subject to the Freedom of Information and Protection of Privacy Act of British Columbia.

12. Related Companies

- 12.1. The Consultant shall not during the term of this agreement, perform a service for or provide advice to any person, firm or corporation where the performance of the service or the provision of the advice may or does, in the opinion of the City, give rise to a conflict of interest between the obligations of the Consultant to the City under this agreement and the obligations of the Consultant to such other person, firm or corporation.

13. Term

- 13.1. This agreement is valid for the period commencing ☒ and ending ☒ (the "Expiration Date"), or such later date as may be mutually agreed upon.

14. Termination

- 14.1. Notwithstanding any other provisions of this agreement, the City may terminate this agreement at any time upon at least two (2) weeks' written notice delivered to the Parties at the addresses shown on the first page of this agreement, or such shorter time and in such a manner as may be agreed upon by the parties.
- 14.2. Notwithstanding the provisions of subsection 14.1, if in the opinion of the ☒, the Consultant has breached a material covenant, the City may cancel this Agreement immediately without notice.

15. Notices

- 15.1. Any notices or other communications required or permitted hereunder shall be sufficiently given if delivered, or if sent by prepaid regular mail, to the addresses of the parties set out on the first page of this agreement, or to such other addressees as shall have been specified by notice in writing by either party to the other. Any such notice or communication shall be deemed to have been given, if delivered, and if mailed in Canada, on the fourth business day after the date of mailing.

16. Feminine/Masculine

- 16.1. Wherever the singular or masculine is used throughout these Terms the same shall be construed as meaning the plural, the feminine or body corporate or politic where the context or the parties hereto so require and vice versa.

17. General

- 17.1. This Agreement may be amended upon mutual agreement of the parties in writing.
- 17.2. This Agreement and the rights and obligations of the parties hereunder shall be governed by and construed in accordance with the laws of British Columbia.
- 17.3. This Agreement sets out the entire agreement of the parties and no representations, warranties or conditions have been made other than those expressed or implied herein. No agreement collateral hereto shall be binding upon the City unless made in writing and signed by the City.

City of Richmond
Contract 3731P
Request for Proposal Migration to Vista/Office97

The City and the Consultant Agree to these Terms the day and year first above written.

Consultant

City of Richmond



August 13, 2009

City of Richmond
Business & Financial Services
Department
Finance Division
Telephone: 604-276-4218
Fax: 604-276-4162

To Those Parties Receiving Contract 3731P
Request for Proposal – Contract 3731P Consulting Services for Migration to Office 2007/Vista

Dear Sir or Madame:

Re: Addendum #1
3731P Consulting Services for Migration to Office 2007/Vista

This addendum forms part of the Contract Documents and shall be read, interpreted and coordinated with all other parts.

- 1. Question:** Is there an incumbent or organization already in place or working with the City on this that will be bidding?
Answer: No, there is not an incumbent or organization working with the City on this project.
- 2. Question:** Under 7. Proposal Submissions, it asks for “A detailed listing of Project Management experience.” Is this project management experience of the company or the consultant, or both? (page 5).
Answer: Please include all relevant experience of the consultant.
- 3. Question:** Are you asking for a proposal fully outlining the project plan and cost a team of staff to use for the engagement? If so, can you provide more information on the applications in the environment , desktop hardware status, server/authentication infrastructure in the environment, where the workstations are, the city staff skill sets. etc. Why I find this conflicting is because of the following:

Under 1.0 introduction it says

“The City of Richmond proposes to engage the services of a Project Management Consultant to develop a detailed project plan to upgrade its current computing environment to Microsoft Office 2007/Vista and lead the City IT Project Team through all major phases of the upgrade for 100 workstations (the “Project”) “

and under 2.0 project background

“The project team, led by the Consultant, will consist of a cross-section of Information Technology staff, as well as 100 City staff from other departments to do advanced testing.”

These 2 sections both lead me to conclude that the city will provide staff to the PM

But under section 4. Proposal Submissions, it says

- Team Composition – a complete listing of all key personnel who will be assigned to this project. This will include their relevant experience, qualifications for this project, roles and responsibilities, leadership, etc., in addition to their availability for this project.
- Provision of a priced methodology complete with a time allotment for each identified task you propose to employ to carry out the work, this shall form the basis for payments to the successful proponent. Supplement this with a schedule of fees for staff to be assigned to the project. These rates shall be the basis for adjustments to the value of the contract in the event the scope of work varies from that proposed.

Can you please clarify what exactly you are looking for and additional information you have on your environment.

Answer: The City is looking for a Consultant or Consulting firm to lead the City of Richmond IT Project team. Please provide details on the key personnel who will be providing the consulting services.

4. **Question:** In order for us to provide a more detailed, high quality submission of the recommended process to achieve the project objectives (7th bullet in Section 7 of the RFP), please clarify the project objectives listed in Section 4: 'Project Background'. In other words, the current project objectives seem to be a list of project phases rather than measurable project objectives based on cost, time, scope and quality.

Answer: No additional project objectives have been formally identified. This will be done once the Consultant is hired and project initiation is underway.

5. **Question:** Is it possible to provide a list of applications categorized, based on the level of effort to migrate to Office 2007/Vista? In other words, do some applications require extensive remediation (i.e. code changes) or are most of the applications simply COTS upgrades? The answer to this question will change the team composition, activities and phases.

Answer: Upgrades will be performed by the City staff. However the City develops very little software of its own; the exceptions are some GIS and web-based applications. The extent of remediation is not yet known, and will be identified once project initiation is underway.

Regards,



Sumita Dosanjh
Contracting Specialist



August 17, 2009

City of Richmond
Business & Financial Services
Department
Finance Division
Telephone: 604-276-4218
Fax: 604-276-4162

To Those Parties Receiving Contract 3731P
Request for Proposal – Contract 3731P Consulting Services for Migration to Office 2007/Vista

Dear Sir or Madame:

Re: Addendum #2
3731P Consulting Services for Migration to Office 2007/Vista

This addendum forms part of the Contract Documents and shall be read, interpreted and coordinated with all other parts.

1. **Question:** Does the City of Richmond have a development lab for desktops for use in this project?
Answer: The City does not have a formal development lab for desktops, however sufficient facilities can be made available if required.
2. **Question:** Does the City of Richmond have a development and test environment for enterprise applications for use in this project?
Answer: The City does not have a formal development and test environment for enterprise applications however the City will work with the successful Proponent to provide if required.
3. **Question:** Do any of the macros and templates establish data interchange with non- Microsoft applications such as the ERP system?
Answer: Yes.
4. **Question:** If so, how are these to be tested?
Answer: As indicated in the RFP, project task #7 is Testing & User Engagement; this will be specified as part of the project.
5. **Question:** Can you clarify if in Section 7 Submission, the content of the response sought by the City in the paragraphs below is specifically related to the Project Management tasks, not the technical team's deliverables?

Project Methodology

A detailed project methodology explaining each project task including what will be expected of both the consultant and the City with respect to each task.

Detailed Proposal of Expected Outcomes and Benefits

A detailed proposal of what will be delivered, including the expected outcome and benefits to the City of Richmond.

Definition of the Process

A complete definition of the process that will be employed to meet the objectives of this project, e.g., approach to be taken, feasibility and market study, etc.

Answer: These tasks are related to the Project Management tasks.

Regards,

A handwritten signature in black ink, appearing to read 'Sumita Dosanjh', written in a cursive style.

Sumita Dosanjh
Contracting Specialist