



REQUEST FOR EXPRESSIONS OF INTEREST

Information Technology Services

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Jonathan Storage
City Manager

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SECTION ONE: GENERAL INFORMATION

1.1. Purpose

The City of Charleston is soliciting Expressions of Interest (“EOI” or “Proposals”) from qualified firms to provide various information Technology (“IT”) services to supplement the work of the City’s Information Systems Department.

1.2. Background

The City of Charleston is West Virginia’s capital and largest municipality. The city limits span approximately 33 square miles, and it has a resident population of just under 50,000. The system of government is a Strong Mayor/City Council structure. The City Manager is the Chief Administrative Officer for the City and is appointed by the Mayor with approval by the Council.

The City’s IT services are currently managed by the Information Systems Department (“Department”), which employs 10 full time staffers. Due to various staffing challenges, the Department has been under-staffed in several key areas, including cyber security, network redesign, GIS, and website development/maintenance.

The Department is currently administering substantial system replacement projects, including replacing the City’s ERP system, cashing system, and revenue tracking system. Due to the demanding nature of these projects and the current lack of staff, the City is seeking to supplement the Department with consulting services.

SECTION TWO: SCOPE OF SERVICES

2.1. Expectations

The successful firm will be expected to perform the following activities:

- communicate effectively with applicable stakeholders, including but not limited to the City Manager’s Office and the IS Department;
- administer the City’s cyber security program, including implementing multi-factor authentication protocols for VPN and remote access services, identifying cyber threats and reporting them to Department staff, and assisting with cyber-attack mitigation efforts, establishing patch cadence and relevant best practices policies, assisting with the replacement of end-of-life hardware, and replacing the City’s System Password Manager application;

- assist the City with administering, implementing, and enforcing IT policies;
- administer the City's network redesign process, including (as mentioned above) replacing end-of-life hardware and updating fiber/cable runs throughout City Hall and other City Buildings;
- assist with implementation of the VM and SANs replacement;
- assist with sourcing a permanent remote access application;
- administer the City's fiber connectivity project;
- assist with procuring updated equipment for City Hall's A/V Room (Committee Room - 308);
- assist with procuring a new voting, microphone, and online video streaming system for City Hall Council Chambers;
- assist with administering the City's various websites;
- may be requested to attend various committee and Council meetings;
- may be requested to perform feasibility analyses; and
- may be requested to perform project construction cost estimating.

SECTION THREE: INSTRUCTIONS TO FIRMS SUBMITTING PROPOSALS

3.1. The Proposal

Consultants interested in being considered for work must submit an Expression of Interest to the City Purchasing Director. **No pricing information is permitted to be included in the submitted EOI.**

Proposals should be prepared simply and economically, providing straightforward, concise descriptions of the firm's capabilities to satisfy the City's service needs. Emphasis should be placed on completeness and clarity of content.

The EOI should include the following items:

- Statement of the firm’s history and experience;
- Statement of the firm’s overall capabilities to handle the proposed work, including personnel to be assigned to the work, their qualifications, and their current workload;
- Statement identifying who the intended project manager will be;
- Office location where the work will primarily be performed;
- Statement regarding whether the firm maintains a cost accounting system that is capable of segregating and identifying accumulating costs for each job that is performed under cost-type contracts;
- Statement that the firm’s Workers’ Compensation and Unemployment Accounts are in good standing;
- Statement regarding any debarment status (whether debarred by any federal, state, or municipal agency);
- Statement that the firm is in good standing with the City Collector’s Office regarding its tax and fee obligations to the City of Charleston (if applicable); and
- 2 letters of reference from clients for whom the firm has provided comparable services within the last 3 years.

NOTE: Ownership of all data, materials, and documentation originated and prepared for the City pursuant to this solicitation will belong to the City and are subject to the West Virginia Freedom of Information Act, unless the content is proprietary in nature such that it is excluded from production. All pages or sections of submitted documents considered by the firm to be proprietary in nature should be clearly labeled.

3.2. Questions About the Solicitation

All questions must be transmitted according to established deadlines to Ms. Jamie Bowles, Purchasing Director, by emailing Jamie.Bowles@cityofcharleston.org.

Firm representatives are prohibited from communicating with elected City officials or City staff (excluding the Purchasing Director and the City Manager) from the time the solicitation is advertised until the Evaluation Committee makes its final selection.

3.3. Submission of Proposal

All proposals must be submitted in electronic PDF format.

Proposals must be transmitted according to established deadlines to Ms. Jamie Bowles, Purchasing Director, by emailing Jamie.Bowles@cityofcharleston.org.

Files exceeding **15 MB** should be transferred via a secure sharable link (such as through Microsoft OneDrive, SharePoint, Dropbox, etc.).

SECTION FOUR: PROPOSAL EVALUATION & SHORTLIST

4.1. Evaluation Committee

All EOIs will be reviewed by an Evaluation Committee established by the City Manager.

The Evaluation Committee will consider the statements of qualifications and performance data and other material submitted by the interested firms. The Evaluation Committee will select no more than 5 firms that, in the committee's opinion, are the best qualified to perform the desired services.

The shortlisted firms will be invited to participate in interviews, which may be conducted virtually.

4.2. Shortlisted Firm Evaluation

The Evaluation Committee will conduct interviews of the shortlisted firms and evaluate each firm based on the following scoring criteria.

Evaluation Criteria

Experience & Qualifications.....45 pts

- History and stability of the firm (5 pts)
- Professional competence (15 pts)
- References (10)
- Experience providing comparable services (15 pts)

Implementation Services.....45 pts

- Office location where the work will be primarily performed (5 pts)
- Current workload and ability to complete work (15 pts)
 - including personnel to be assigned to the work, their qualifications, and their current workload
- Ability to provide prompt and responsive services—particularly relating to cyber security, networking, website maintenance, and remote access issues. (25 pts)

Oral Interview.....10 pts

- Demonstrated thoughtfulness in project handling (5 pts)
- Assessment of the firm’s proposed project manager(s) (5 pts)

NOTE: The Evaluation Committee will notify each shortlisted firm of the results of the scoring process, including the name of the selected firm.

SECTION FIVE: SCHEDULE OF EVENTS

Release of the EOI.....	May 16, 2022
Written Questions Submission Deadline.....	June 3, 2022, 4:00 PM (EDT)
Addendum Issued	June 10, 2022
Expressions of Interest Due Date.....	June 24, 4:00 PM (EDT)
Estimated Date for Interviews of Shortlisted Firms.....	Week of July 18, 2022

NOTE: The schedule is subject to change. Please visit the following City website for updates:
<https://charlestonwv.gov/bids-purchasing/current-bids>

SECTION SIX: GENERAL CONTRACTING PROCESS

6.1 Scope of Work Meeting

The City and the selected firm will hold a project scoping meeting that will outline the general work requirements. The City will distribute a set of Scope of Work Notes to the firm post-meeting, and the City will also provide information on how to prepare and submit the firm’s fee proposal.

The firm will be requested to submit a narrative describing its project assumptions and related data to be used in preparing its fee proposal.

As soon as is practical, the City will review the firm's narrative and make any corrections or clarifications regarding the scope of work to be performed. Upon drafting the final Scope of Work Notes, both the City and the firm will sign off on them.

6.2 Cost Proposal

Unless otherwise advised, the method of payment for the fee proposal may be presented as a cost plus fixed fee, lump sum, or specific rate of pay subject to the City's approval.

The Cost Proposal must include:

- All costs related to the salaries of employees for time directly chargeable to the project must be shown as an hourly rate. Direct non-salary costs estimated in the fulfillment of the contract must be presented in a unit rate format.
- Should overtime be required due to the anticipated schedule of the project, the firm shall clearly delineate and separate the premium portion of the overtime in their proposal.
- Subcontract costs shall be acquired on a quote basis and generally requires a minimum of 3 quotes. Copies of all quotes shall be retained for an audit review.
- All subconsultants must be listed in the fee proposal and are subject to City approval.
- The prime consultant may change subconsultants following negotiations; however, no increase in the contract cost will be permitted. Written approval must be obtained prior to engaging any subconsultant not previously presented in the original proposal or EOI.
- Subconsultant costs must include all of the costs and show supporting data using the same criteria as required of the prime consultant.
- The original and all supplemental fee proposals shall include a technical narrative from the prime consultant and each subconsultant describing their portion of the work to be performed. The narrative shall state in detail all assumptions

made in preparing the fee proposal.

- The fee proposal shall contain a proposed schedule showing the estimated starting date, duration, and completion of all major milestone activities.

6.3 Negotiation

Once the firm submits the fee proposal, it will be evaluated by the City. The City and the firm may schedule negotiation meetings to discuss differences, discrepancies, etc. Once negotiation of the fees is complete, the City will prepare a consultant agreement.

6.4 Agreement

The City will prepare an agreement based upon the agreed-to Scope of Work. Additionally, the agreement will outline the monetary considerations agreed to by the parties. Each agreement will have a maximum amount payable. The firm will not be permitted to perform work that will exceed the maximum payable amount.

Should a substantial change in scope, complexity, or character of work develop, the project will be evaluated, and a revised maximum amount will be negotiated. The agreement may be amended by supplemental written agreement only.

SECTION SEVEN: INVOICING & PAYMENT

7.1 Presenting Invoices

The firm shall not submit any invoice for payment for services prior to the agreement being fully executed.

All invoices should be presented in the following manner:

- Invoices must be addressed to the appropriate City official. (The firm will be informed of the designed City official at the Scope of Work Meeting.)
- Invoices must clearly identify the project, including listing any assigned project numbers.

- Invoices must be able to be identified by invoice number and date (not by payment request amount).
- Invoices must list the firm's Federal Employer's Identification Number ("FEIN").
- Invoices for cost plus fixed fee agreements shall have two attachments:
 - (1) a tabulation of direct payroll costs, which includes employee name (or employee number), title, and hourly rate of salary; and
 - (2) a tabulation of direct non-salary costs, which includes printing, transportation costs, expense accounts, etc.
- Upon submission of the final project invoice, all records of direct cost must be in the firm's possession, filed, and referenced according to the invoice number and project number (if any) they were billed under.
- A tax release from the West Virginia Tax Department and the City Collector's Office is required to be submitted with the firm's final invoice.

Prime consultants will be required to pay all subconsultants within 10 calendar days of receiving payment from the City of Charleston.