

COUNTY OF YUBA

REQUEST FOR PROPOSAL

Migration Consultation
Windows Server 2003 & Exchange 2003 migration to
Windows Server 2008/Exchange 2007

March 31, 2009



Proposal Due Date: April 24, 2009
By 2:00 P.M. PST

The County of Yuba is seeking proposals from qualified Consultants with experience in architecture level design and migrating Windows Active Directory (A/D) and Exchange. Currently, the County environment is Windows 2003/Active Directory (AD) 2003(native) and Exchange 2003 in a single forest, single-domain. The migration support consulting is intended primarily to provide for the various one-time tasks required for developing a migration plan to Server 2008/ Active Directory 2008 with MS System Center components including at least Exchange 2007 with Unified Messaging and Configuration Manager in a new forest, domain structure.

The County is seeking pricing for several options. Under Option 1, Information Technology staff will support the administration of Active Directory and Exchange, and perform actual migration tasks as determined by the plan. As a second Option, the County is also seeking pricing for actual performance of the AD implementation and migration. The County believes its current AD structure is insufficient to support planned growth. Option 1 should include the assumption of a large redesign or a new AD structure that would be migrated to. As a third Option, the County may choose Options 1 and 2 plus Microsoft Unified Messaging (MUM) implementation. Servers are geographically dispersed throughout County of Yuba departmental sites, located in Marysville, CA approximately 30 minutes north of Sacramento, in the Sacramento River Valley of California.

I. SCOPE OF WORK

Selected Consultant shall provide:

- a) Professional architect level design and guidance for Microsoft Active Directory on Server 2008 and MS System Center Components with Unified Messaging and Configuration Manager as well as design and planning for migration from current environment to new environment as designed.
- b) Understanding of what is involved for the duration of project.
- c) Consultation services to develop a Migration Plan with technical staff.
- d) A written Migration Plan with detailed project documentation.
- e) All post-migration documentation as specified in this document and determined necessary in the development of the County Migration Plan.

- f) Other consulting or training for skill sets necessary for successful project completion (see section III A.)
- g) Necessary scheduled on-site meetings and services, not precluding remote-access consultation services.

Option 1 Key Tasks:

- a) Project planning for the implementation and migration to newly designed environment.
- b) Provide Consultation and design services for migration of existing County of Yuba Windows 2003-A/D 2003 and Exchange 2003 production environment to Server 2008 and System Center Configuration Manager, and Exchange 2007 with Microsoft Unified Messaging (MUM) services integrated with the County's existing SIP compliant phone system.
- c) In conjunction with county technical staff, develop a comprehensive written Project Migration Plan. This shall include the creation of a task level migration schedule to include task man-hour estimates and anticipated duration.
- d) Provide complete site-wide design and migration documentation detailing all migration tasks performed. The design documentation shall include a detail document of the post-migration Windows 2008/Exchange 2007 system, changes from prior Windows 2003 Active Directory implementation, site maps, and diagrams accurately representing the post-migration Active Directory 2008 and Exchange 2007 infrastructure. Provide any needed additional documentation of the migrated system as Consultant would consider necessary or highly desirable in this type of project.
- e) Provide post-migration support as needed for up to one year from date of contract award. This can be on a contracted or per-call basis and will encompass post-migration support, question and answer sessions and documentation detail support, though not necessarily limited to this. Bid should include time and materials pricing for such support.

Deliverables– Option 1

Proposals must include a Detailed Cost Estimate with the following:

- a) Design work, training and guidance as specified in this RFP.
- b) Time estimates of performing actual Migration for all sites.
- c) Project Migration Plan.
- d) All documentation as specified in this RFP.
- e) Other consulting or training costs associated with successful project completion.
- f) Cost for as-needed post-migration support.
- g) Cost of any anticipated travel expenses paid at County's per diem rates.

Consultant shall provide detailed costs for migration planning services, and documentation for new structure. The costs should be presented as line-items, as listed in the Detailed Cost Estimate items above. If the Consultant provides time-based costs, an estimate of the number of hours to complete the project shall be included.

Option 2 Key Tasks

Provide estimate for consultant to implement AD Exchange 2007 designed in Option 1. Consultant shall provide proposed user acceptance tasks with input from County that, upon written approval and completion of acceptance testing as outlined by County, shall indicate acceptance of criteria. County shall accept implementation in writing.

Deliverables - Option 2

- a) Cost Estimate for fully implemented Exchange 2007 and AD System as designed in Option 1 above.
- b) Outlined user acceptance test completion and system acceptance by County.
- c) Final State system documentation.

Option 3 Key Tasks

Provide all tasks outlined in Option 1 and Option 2 plus MUM implementation. Acceptance test shall include MUM testing.

Deliverables - Option 3

- a) Fully implemented Exchange 2007 with Microsoft Unified Messaging as outlined in Option 1 above.
- b) Outlined user acceptance test completion and system acceptance by County.
- c) Final State System Documentation.

II. STATEMENT OF QUALIFICATIONS

Please provide a brief history of organization to include type of organization, size, registration, and affiliations. Please also provide names and qualifications of key personnel to be assigned to this project, an outline of at least three recent projects completed that are directly related to this project, including references and contact information. Consultant is required to demonstrate specific project expertise related to this project.

County will provide

- a) County will be available to copy/extract current production A/D structure and data objects. However, County may require Consultant's assistance in exporting and importing this copy/extract of the production A/D structure and data objects.

III. ADDITIONAL REQUIREMENTS

- a) Consultant personnel must have direct project experience doing similar design and implementation on at least three projects of equal or greater scope. Consultant must demonstrate appropriate certification and training for key personnel including but not limited to Microsoft Certified Technology Specialist (MCTS), Microsoft Certified Professional (MCP). Consultant must also be a Microsoft Certified Gold Partner.

- b) The Consultant must demonstrate they have the technical expertise, experience, facilities, capabilities, and financial resources necessary to perform the work in a satisfactory manner. A schedule of events and a timeline of those events necessary to meet and complete the requirements for each option must be submitted with the proposal.
- c) In the event Options 2/3 are awarded by County, County and Consultant shall agree to user acceptance test criteria in writing prior to commencement of work.
- d) Consultant must assess and outline training needs to prepare staff for supporting new environment in most efficient manner. Consultant shall provide rates for at least twenty hours of classroom training and hourly pricing for training needs in addition to the twenty hours.
- e) Consultant must provide lowest available prices to County including but not limited to CMAS, WSCA, etc.
- f) Selection will be made by a County Evaluation Team. The Evaluation Team may deem it necessary to schedule presentations and/or interview applicants and key personnel. The County retains the right to interview applicants as part of the selection process. Members of the Evaluation Team are not to be contacted by the proposers.
- g) County expects consultant's key personnel to be available for duration of project. County must be consulted in advance by Consultant if key personnel are to be replaced during contract term. County must give prior written approval for key personnel changes. All costs incurred by County for key personnel changes shall be borne by Consultant.
- h) All work shall be done in a manner that offers minimum interference and disruption to the normal activities of the County facilities. Consultant must comply with all facility security guidelines. Background security checks including but not limited to LiveScan and DOJ clearance will be required for all Consultant personnel working on this project at the expense of Consultant.
- i) All work performed shall be in compliance with appropriate OSHA standards, as well as all Federal, State, County, and local

ordinances and regulations. Consultant must obtain all licenses and permits required.

- j) All work performed and completed under the resulting agreement is subject to the acceptance of the County or its authorized representative.
- k) Consultants shall furnish to the County, *upon award of contract*, certificate of insurance naming the County as an additional insured party in amounts requested by County and maintain such insurance during term of contract.

IV. EVALUATION CRITERIA

The County reserves the right to cancel this Request for Proposal for any reason without any liability to any Consultant or to waive irregularities at its discretion. This solicitation does not constitute a contract, offer of employment, or offer of purchase. The County may select any Option or combination of Options outlined in the scope of work at its own discretion. The County makes no representation that any contract will be awarded to any respondent to this solicitation. The County also reserves the right to reject any and all proposals at its sole discretion.

The contract(s), if awarded, will be awarded to the Consultant whose proposal is considered the best value to the County. Best value will be determined based on price, responsiveness, and responsibility:

- a) The lowest price is determined by the total cost to the County for Option 1 alone, or any combination of Options 1, 2 and 3.
- b) Responsiveness means a Consultant who has submitted a proposal that conforms to the solicitation documents in all material aspects.
- c) A responsible Consultant shall mean a Consultant who has the capability, in all respects, to fully perform the contract requirements and the moral and business integrity and reliability that will assure good faith performance. Qualifications, interview, and experience will be taken into consideration.

Thus the result will not be determined based solely on price. Although price is a factor, the County will consider awarding the contract(s) to the Consultant that meets the best interest of the County as interpreted by the County.

V. PRE-PROPOSAL CONFERENCE CALL

A pre-proposal question and answer conference call will be held on Wednesday, April 15, 2009 to discuss all submitted written questions. Prospective Consultants must send an email RSVP and submit written questions to the contact person listed by 5:00 P.M. PST on Friday, April 10, 2009 in order to reserve a place on the call. The time of the call and phone number will be provided to those who RSVP. While participation in the call is not mandatory, the County anticipates that the information provided will be very helpful and will improve proposals; therefore, interested Consultants are encouraged to participate.

VI. PROPOSAL SUBMITTALS

Please include the following with your proposal in this order:

- Statement of Qualifications
- Project Understanding
- Scope of Work for each Option
- Proposed Training
- Detailed Cost Estimate
- Project Schedule
- Attached Proposal Form

VII. TERMS AND CONDITIONS

Proposals are subject to the following terms and conditions:

- a) **Contract Term:** The term of the agreement resulting from this solicitation will be approximately six months beginning approximately June 2009.
- b) **Project Schedule.** The County's preference is to have Option 1 complete within forty five days from contract start date. Option 2 and 3 to be completed as soon as feasible within six months from contract start date. Upon receipt of proposals, and suitable review, COUNTY expects to select a Consultant. Once selected, CONSULTANT and COUNTY will participate in the development of custom migration strategic plan, and then schedule the migration and commencement.
- c) **Contract Form:** The final contract(s) will incorporate the appropriate terms and conditions from this solicitation.

- d) **References:** To receive consideration, proposals must clearly and specifically address how the requirements for each item will be met. Proposal must include a Statement of Experience and three references including contact information from projects similar to ours. References should be for migrations from Windows 2003 to Windows 2008, and Exchange 2003 to Exchange 2007.
- e) **Submittal Instructions:** Before submitting a proposal, Consultants shall fully inform themselves as to all conditions and limitations and shall include in the proposal a sum to cover the cost of all items. FIVE proposals must be submitted in a sealed envelope, clearly marked "Microsoft Migration" to:

Yuba County Department of Administrative Services
Attn: Purchasing and Contracts
915 Eighth Street, Ste. 119
Marysville, California 95901

No responsibility will attach to a County employee for the premature opening of a proposal not properly addressed and identified. Proposals will not be publicly opened and read. Proposals will be privately reviewed and evaluated by a County evaluation team.

- f) **Proposal Due Date:** In order to be considered, proposals must be received at the above address not later than **2:00 pm, Friday, April 24, 2009**. A proposal may be withdrawn by written request received from the County prior to the time set for the closing date.
- g) **Proposal Validity:** Proposals must be valid for a period of not less than ninety days after the solicitation closing date.
- h) **Contact Information:** Ann Mehta, Assistant Purchasing Agent, is the designated contact person for questions related to this Request for Proposal. Please submit questions in writing to the address listed above, or by e-mail to: amehta@co.yuba.ca.us

Ann Mehta
(530) 749-7882

**COUNTY OF YUBA
YUBA COUNTY MIGRATION CONSULTATION
PRICE PROPOSAL FORM**

The undersigned has carefully checked all figures in his/her proposal and understands the County of Yuba will not be responsible for any errors or omissions in preparing this proposal. The proposal shall remain valid for any and all services provided for a period of sixty days.

FIRM NAME: _____

CONTACT NAME: _____

ADDRESS OF FIRM: _____

TELEPHONE: _____

EMAIL ADDRESS: _____

FEDERAL ID NUMBER: _____

BUSINESS LICENSE NUMBER: _____

AUTHORIZED SIGNATURE: _____

TITLE: _____

OPTION 1 \$ _____

OPTION 2 \$ _____

OPTION 3 \$ _____

TOTAL (ALL 3 OPTIONS) \$ _____

PLEASE LIST 3 REFERENCES WITH LOCATION AND TELEPHONE NUMBER:

(Please include this Form with your Proposal along with a Detailed Cost Estimate.)