



INFORMATION TECHNOLOGY DEPARTMENT

16 Lincoln Road, Lincoln, MA 01773

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REQUEST FOR

No. RFP-0001-2009/IT

PROFESSIONAL INFORMATION TECHNOLOGY (IT) CONSULTANTS

Issue Date: April 30, 2009

Due Date: May 15, 2009, Friday, 3:00 p.m. EST

Return To: Ms. Anita Scheipers – Assistant Town Administrator
Town of Lincoln Procurement Officer
Phone: 781-259-2600
Fax: 781-259-1677
Email: scheipersa@lincolntown.org

Notice and Instructions to Proposers

1. Proposals must be received in the above office no later than the due time and date or they will be considered late and will be rejected.
2. Submit **one (1) original** (clearly identify), **nine (9) complete copies** and one electronic copy (PDF or other compatible format) of your technical proposal. Include all required information and/or certifications as stated in ¶16, Submittal Format and Requirements. Submit one (1) original of your separate and sealed price proposal.
3. All proposals (separate technical and price proposals) must be packaged in a sealed outer envelope, clearly labeled in the lower left hand corner:

Proposer Name and Address

RFP # 0001-2009/IT

TITLE: PROFESSIONAL IT CONSULTANTS

Due: May 15, 2009, Friday, 3:00 p.m. EST

4. Deliver sealed proposals to:

Ms. Anita Scheipers, Assistant Town Administrator
Town of Lincoln Procurement Officer

Phone: 781-259-2600
Fax: 781-259-1677
Email: scheipersa@lincolntown.org

5. Late, faxed and/or unsigned proposals will be rejected.

**6. For questions regarding this RFP, contact
Ms. Anita Scheipers, Assistant Town Administrator**
Town of Lincoln Procurement Officer
Phone: 781-259-2600
Fax: 781-259-1677
Email: scheipersa@lincolntown.org

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FORMS FOR SUBMITTAL:

- 1. RFP Form A: Signature Affidavit
 - a. Part I: Acknowledgement of Receipt of Forms
 - b. Part II: Response Submittal Checklist
- 2. RFP Form B: Consultant Profile Information

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SECTION A: ADMINISTRATIVE QUALIFICATION INFORMATION and CONDITIONS

1. INTRODUCTION

The Town of Lincoln seeks a qualified consultant to provide a townwide comprehensive Information Technology (IT) Strategic Plan. A strategic planning document, including an implementation plan will enable the Town to effectively and efficiently leverage existing computer hardware and software applications, while laying the groundwork for newer applications, functions and evolving technologies in an organized and systematic fashion.

Applications may include, but are not limited to the following: Increased web functionality, including Content Management Systems, interdepartmental workflow and collaboration tools, document management, e-mail archiving, online permitting, expanded use of GIS and database technology. In addition, storage technology, improved remote access tools, virtual desktop implementation, asset management, help desk tools, reporting tools, unified communications, streaming voice and video, etc.

This Request for Proposals (RFP) seeks responsive full proposals from one or more qualified consultants, who demonstrate the capability and proven experience to provide professional IT services, to submit a complete project proposal for consideration. It is expected that due to the range of expertise required in this RFP that consultants may team up to cover all areas of proficiency.

2. DEFINITIONS

"Town of Lincoln," "Town," "Purchasing," and "Procurement Officer" are synonymous and mean the Town of Lincoln.

"Qualifications," "applications," "bid," "proposal," and "offer," are synonymous; and it is understood that once the Town accepts the same, the document will constitute the contract contemplated by these instructions.

3. CALENDAR OF EVENTS

Listed below are specific and estimated dates and times of actions related to this Request for Proposals (RFP).

DATE EVENT

- April 30, 2009 Date of issue of the RFP
- May 8, 2009 Deadline for submission of written questions
- May 13, 2009 Response to questions
- May 15, 2009 Proposals Due
- May 22, 2009 Finalists Selected
- May 26-29, 2009 Finalists Interviewed as Needed; Recommendation Devised
- June 1, 2009 Recommended Proposal Submitted to Board of Selectmen
- Week of June 1, 2009 Contract Awarded and instructed to proceed
- September 3, 2009 Draft Plan Submittal Due
- October 2, 2009 Final Report Due (Project Completion Date)

Please Note: These dates are for planning purposes. They represent the Town's desired timeline for implementing this project. The timeline may be adjusted, however, based upon the consultant's recommendation, proposal response, production needs, and other circumstances.

4. INQUIRIES AND CLARIFICATION OF SPECIFICATIONS

Any questions concerning this RFP must be submitted in writing by mail, fax or e-mail on or before May 8, 2009 at 4:00 p.m. to:

Ms. Anita Scheipers, Assistant Town Administrator

Town of Lincoln Procurement Officer

16 Lincoln Road

Lincoln, MA 01773

Phone: 781-259-2600

Fax: 781-259-1677

Email: scheipersa@lincolntown.org

No telephone questions will be acknowledged. Questions posed to the Town will be published on the Town's Professional Information Technology (IT) Consultants project website <http://www.lincolntown.org/itrfp.htm> after the Town has had the opportunity to formulate responses.

Vendors are expected to raise any questions, exceptions, or additions they have concerning the RFP document at this point in the RFP process. If a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the vendor should immediately notify the above named individual of such error and request modification or clarification of the RFP document.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, revisions/amendments and/or supplements will also be posted at the websites indicated. Proposers are encouraged to check the website regularly for questions and answers.

Each proposal shall stipulate that it is predicated upon the terms and conditions of this RFP and any supplements or revisions thereof.

5. PROCURING AND CONTRACTING AGENCY

a. This Request for Proposals (RFP) is issued by the Town of Lincoln Procurement Officer who is the sole point of contact for the Town during the selection process (tel: 781-259-2600, e-mail:scheipersa@lincolntown.org)

b. The contract resulting from this RFP will be administered by:

Ms. Anita Scheipers, Assistant Town Administrator

Town of Lincoln Procurement Officer

Phone: 781-259-2600

Fax: 781-259-1677

Email: scheipersa@lincolntown.org

6. SUBMITTAL FORMAT AND REQUIREMENTS

a. Proposal Organization and Format

Submit ten complete sets (1 original + 9 copies) of the technical proposals and one (1) original of the price proposal. Technical Proposals should be neatly printed and submitted on 8.5 by 11 inch paper bound securely. Proposals must be organized with the following headings and subheadings. Each heading and subheading should be separated by tabs or otherwise clearly marked.

b. Required Submittals

The RFP sections which should be submitted or responded to are:

These are required items to be included in the technical proposal submittals. Forms marked with an asterisk (*) are included in this solicitation. Definitions and descriptions of required information are contained in Paragraph 6.3 following this table.

Tab 1 General Information and Signatures

- a. Signature Affidavit - Parts I and II (*RFP Form A)
- b. Consultant Profile Information (*RFP Form B)

Tab 2 Executive Summary

Tab 3 Qualifications

- a. Overview of Firm Qualifications
- b. Organization Management Approach
- c. Key Staff

Tab 4 Experience, Past Performance, Litigations

- a. General Company Information
- b. Experience
- c. Disclosure of Contract Failures, Litigations

Tab 5 References (*RFP Form C)

- a. Definitions of Required Submittals

Tab 6 Certifications (*RFP Forms D, E)

- a. Certification of Tax Compliance
- b. Certification of Non-Collusion

Note: In addition to the above stated components which are required to be included in the separate technical proposal, proposers are required to submit a separately sealed price proposal – clearly labeled “price proposal” on the envelope.

TAB 1 – General Information and Signatures

- a. RFP Signature Affidavit (RFP Form A, Part I and Part II) Submit certification with the legal name of the Proposer and signature of the person(s) legally authorized to bind the Proposer to a contract.
- b. Consultant Profile Information (RFP Form B) Provide business identification and contact information required in the form. Please include primary and secondary contacts and provide telephone and e-mail contact data.

TAB 2 – Executive Summary

- a. Cover Letter / Executive Summary - The Proposer shall include a brief summary that includes the factual, core aspects of basic services offered, experience and qualifications of the Proposer, staff, consultants, sub-consultants and/or suppliers, a list of relevant projects in the last five (5) years and the timeliness in which they were completed and any other relevant information.

TAB 3 – Qualifications

- a. Qualifications Overview - Provide a brief overview of the general background and services provided by your firm, including size of organization, description of organization structure, and number of years in business, and experience in serving governmental entities. Demonstrate the firm's capability and evidence that the Proposer has experience providing services equal to or greater in scope than those requested in this RFP.
- b. Organization Management Approach - Describe the approach to organization management and the responsibilities of the management and staff personnel that will perform work on the Project; describe method employed to ensure prompt service, customer satisfaction, prompt compliant resolution, effective employee performance and training, and timely initiation and completion of all work.
- c. Key Staff – Identify key staff in your company and affiliates including subcontractors or sub-consultants to fulfill the contract requirements. Provide their resumes with job descriptions and other detailed qualification information. Include the proposed role and estimated amount of time to be spent on this project for each person. Identify who would be contract manager(s) from your company (cannot be from affiliate).

TAB 4 – Experience, Past Performance, and Litigations

- a. General Company Information - State the number of years that the firm has been in business, the number of years in business operation under the firm's current business name. Any business owner who previously operated a business under another name must include a description of the previous business. Failure to include such information may be deemed by the Town as intentional misrepresentation, and may render the submittal non-responsive.
- b. Experience - The Town will evaluate the experience of the Proposer in providing the proposed IT consulting services. Provide a description of relevant experience, especially in projects of similar size and scope. Include a clear statement of your firm's specific role in the process. Be specific and identify projects, dates and results. Include the following information:
 1. The client name, address, telephone number and the name of a contact person
 2. A description of the performed work
 3. The contract period and duration

4. A statement or notation as to whether the Firm was a prime consultant or a sub-consultant.
 5. The result of the project
 6. List any and all contracts the Firm or its principals have performed for the Town.
 7. List all current projects.
- c. Disclosure of Contract Failures, Litigation - Disclose any alleged significant prior or ongoing contract failures, contract breaches, any civil or criminal litigation or investigation pending which involves the consultant or in which the consultant has been judged guilty or liable. Or which may affect the performance of the services to be rendered herein, in which the Firm, any of its employees, subcontractors, or sub consultants is or has been involved in within the last three (3) years.

TAB 5 – References (RFP Form C)

- a. Provide a list of organizations and/or clients with whom the Proposer has done similar business with in the last five (5) years. Include name, address, and phone number of contact person for each. Describe briefly the nature of the project or services provided to each organization listed. If contacted, all references must verify that a high level of satisfaction was provided. The list of references should include at least three (3) projects of closely related work programming.
- b. The Town of Lincoln may also utilize other sources of information about the product(s) and/or service(s) proposed by the Proposer where these sources are publicly available and are equally available for all competing Proposers.

TAB 6 – Certifications (RFP Forms D, E)

- a. Certification of Tax Compliance
- b. Certification of Non-Collusion

7. SELECTION PROCESS

- α. The Procurement Officer will review the RFP submittals and, working with a selection committee, prepare a short list of Consultants who will be invited to a follow-up interview to assist in determining the firm ultimately chosen for the project. Consultants on the short list shall be scheduled to interview on 1 or 2 nights at Town Hall with a selection committee made up of the following members:

- Town Administrator (1)
- Town Clerk (1)
- Finance Director (1)
- IT Director (1)
- Member(s) of School Administration (1)
- Member of the Board of Selectmen (or designee) (1)

- Two to three citizen members with knowledge and experience of IT (3)

Each member of this committee will receive copies of the short list RFP documents in advance of interview sessions. A set of common questions will be developed for the interviews by the Procurement Officer which can be supplemented by members of the committee prior to interviews.

Interviews will be conducted as follows: The committee will explain the procedures of the interview and provide the Consultant with twenty (20) minutes to make a presentation on why their firm should be selected. This presentation should be concise and not a rehash of boilerplate information from their proposal document. After this presentation, the committee will have 35 minutes to ask questions which will allow the Consultant for a five (5) minute wrap-up.

After each interview, the commission will deliberate for up to fifteen (15) minutes to determine an amalgamated score and recommendation which will result in a ranking of finalist firms. Scores will be based on the following and relate to both interview responses and the proposal document:

EVALUATION CRITERIA:

The committee shall evaluate the proposal and the proposer based on the submitted written proposal and on the interview. Ranking of the proposals shall be based on the following and relate to both interview responses and the proposal document:

1. The Consultant's Municipal Reference Check Results: References must be submitted for municipal clients from within the last five years in successfully starting and completing projects of similar type, size and scope as the Town of Lincoln 5-Year IT Strategic Plan.

Highly advantageous – proposal with five or more positives references from municipal clients from the last five years

Advantageous– proposal with more than three and less than five positive municipal references from the last five years

Non-Advantageous– proposal with less than three positive municipal references from the last five years

2. The Consultant's Proposal Quality: which includes document clarity and organization, brevity but completeness, attention to the appropriate details, specific focus on the needs and requirements of the Town of Lincoln, and detailed budget.

Highly advantageous – proposal with clear and concise answers to all details requested in the RFP, with a narrative that depicts a clear understanding of the project proposed by the Town and clear indications as to how the proposer will provide the services necessary within the project, as well as a project outline, proposed schedule, and resource allocation information.

Advantageous - proposal which provides an adequate written description of project understanding and approach

Non-Advantageous - proposal which does not provide adequate information regarding the proposer's understanding of the project, nor of the intended project approach.

3. The Consultant Team Makeup:

Highly advantageous – proposal with the project leader/manager shall be a principal or partner in the firm or a similarly senior position and be the primary contact person. The team shall contain all of the skill sets and experience required for all facets of the project, either within the firm itself or the consultant team. The proposal shall provide an appropriate narrative description of the backgrounds of each team member. It shall also designate their specific role, the number of hours that each is anticipated to work on the project (by task), and their rate

Advantageous - proposal which provides an adequate written description of project understanding and approach

Non-Advantageous - proposal which does not provide adequate information regarding the proposer's understanding of the project, nor of the intended project approach.

4. The approach recommended by the Consultant for this project:

Highly advantageous – Proposal meets all Town objectives for the project with all tasks and services required by the Town included in the proposal. The proposal includes a timeline which adheres to Town requirements, the proposal budget provides sufficient detail to insure that all tasks are considered, and identifies items which may be substituted or removed to reduce cost, and informs the Town that the project will result in the product anticipated. For proposals which recommend a phased project, this element shall comment as to how each phase of the project shall inform subsequent phases and will coordinate so as to result ultimately with a seamless municipal system.

Advantageous - Proposal meets all Town objectives for the project with all tasks and services required by the Town included in the proposal. The proposal includes a timeline which adheres to Town requirements, and provides a budget provides sufficient detail to insure that all tasks are considered.

Non-Advantageous - Proposal does not clearly indicate that all Town objectives for the project with all tasks and services required by the Town

are included in the proposal. The proposal provides no clear timeline indicating ability to adhere to Town requirements. The budget provides basic cost information only.

5. Communication and presentation skills, etc.:

Highly advantageous – The communication and presentation skills of the proposer are adequately developed to allow the evaluation committee to quickly and clearly understand all components of the information presented with little or no need to ask for clarification.

Advantageous - The communication and presentation skills of the proposer are present basic information regarding all components of the information presented.

Non-Advantageous - The communication and presentation skills of the proposer are inadequate to gain understanding of the information presented. As presented requires additional questions to be asked to understand the proposal.

β. RFP submittals will be ranked based on the following criteria:

- Technical Proposal review (up to **50** Points)
- Reference check (up to **30** Points)
- Interview (up to **20** Points)
- Availability (up to **10** Points)

Please note that the Town of Lincoln is an affirmative action/equal opportunity employer (AA/EOA).

8. ADDENDA

Revisions to any part of the solicitation or provision of additional information shall be made by addenda. Proposers must acknowledge the receipt of any addendum in the appropriate section. It shall be the responsibility of the Proposers to regularly monitor the project website used by the Town (<http://www.lincolntown.org/itrfp.htm>) for any such postings. Failure to retrieve such addenda and include their appropriate provisions in your response may result in your bid being disqualified.

9. ACCEPTANCE/REJECTION OF QUALIFICATIONS

- a. The Town reserves the right to accept or reject any or all statements of qualifications submitted, in whole or in part, and to waive any informalities or technicalities which at the Town's discretion are determined to be in the best interests of the Town. Further, the Town makes no representations that a contract will be awarded to any Proposer responding to this request. The Town expressly reserves the right to reject any and all bids responding to this invitation without indicating any reasons for such rejection(s).

- b. The Town reserves the right to postpone due dates and openings for its own convenience and to withdraw this solicitation at any time without prior notice.

10. INCURRING COSTS

This RFP does not commit the Town to award a contract, pay any costs incurred in preparation of these applications, or to procure or contract for any services.

11. PROPOSER QUALIFICATIONS

The Town of Lincoln may make such investigations as it deems necessary to determine the ability of the Proposer to perform the work, and the Proposer shall furnish to the Town all such information and data for this purpose, as the Town may request. The Town reserves the right to reject any proposal if the evidence submitted by, or investigated of, such Proposer fails to satisfy the Town that such Proposer understands the full scope of work and is properly qualified to carry out the obligations of the contract and to complete the work contemplated herein.

12. PROPOSAL CONTENT

The evaluation and selection of a Consultant and the contract will be based on the information submitted in the vendor's qualifications plus references and any required on-site visits or oral presentations. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

13. DESIGNATION OF PROPRIETARY INFORMATION

- a. All restrictions on the use or inspection of data contained within a bid shall be requested prior to submission of the bid itself. Written requests for confidentiality shall be submitted to the Town of Lincoln Procurement Officer (or a designee) by the Proposer prior to the bid submission date.
- b. Requests that are granted shall use the following format:
 - Any information to be considered confidential or proprietary must clearly stated on the attached "Designation of Confidential and Proprietary Information" form and separated from the rest of the bid package.
 - Co-mingling of confidential/proprietary and other information is not acceptable.
 - Neither a bid, in its entirety, nor bid price information will be considered confidential and/or proprietary.
 - Any information that will be included in any resulting contract cannot be considered confidential.
 - Proprietary information submitted in a bid, or in response to the RFP, will be handled in accordance with the applicable Law(s) of the Commonwealth of Massachusetts. To the extent permitted by law, it is the intention of the Town to withhold the contents of the bid from

public view until such times as competitive or bargaining reasons no longer require non-disclosure, in the opinion of the Town. At that time, all bids will be available for review in accordance with the Massachusetts Open Records Act.

14. ACCEPTANCE OF TERMS

By submitting an application, the Proposer affirms its acceptance of the terms and conditions of this RFP, including its attachments and exhibits, without exception, deletion or qualification, and without making its offer contingent.

15. PUBLIC OPENINGS

There will be no public openings following the due date for submission of qualifications. All information received shall remain confidential until the selection of qualified consultants has been completed.

SECTION B: PROJECT INFORMATION AND SPECIFICATIONS

1. INTRODUCTION and BACKGROUND:

The Town of Lincoln is a municipal corporation within the Commonwealth of Massachusetts having a 2000 population of 5065 (U.S. Census of Population & Housing). Over the past decade, the Town has incrementally acquired various technologies (hardware and software) designed to address very specific department-based needs, such as accounting software or word processing software for administrative personnel, Computer-aided Dispatch and Reporting software for Public Safety, Property Assessment applications for the Assessors, etc .

The Information Technology Department was established to be a centralized support function, thereby allowing departments and staff to focus their attention on their core business responsibilities. As such, IT frees up departments from being distracted by daily operations such as data backups, moves, adds, changes, systems patches, antivirus, SPAM, etc.

In addition, IT manages all upgrades of Hardware and Software, ensuring compatibility with all other devices on the network. The IT Department handles the Capital Planning Function; IT represents all Municipal Departments (excluding Academic & Faculty support at the Schools). This budgeting function includes, purchasing and deployment of all network, hardware and software solutions, as well as ongoing maintenance.

The IT Department maintains nine servers (MUNIS, Vadar Systems, Patriot Properties, Exchange Mail, Public Safety, Pamet Systems, Library, Pictometry, and Outlook Web Access). IT also supports over 100 PCs for over 100 users in nine locations; Town Offices, Public Safety, DPW, Bemis Hall , the Library, the Water Treatment Plant, the Lincoln School Campus and the Hanscom School Campus, as well as Pierce House.

To keep all this equipment and these software applications running effectively requires a great deal of effort. All vertical software applications are maintained under software agreements with developers. In all cases, this provides the Town with access to upgrades to the latest versions, as well as patches. In some cases, it also includes remote access support with their technical staff directly accessing the applications server for maintenance and upgrades via a secure remote connection.

For hardware maintenance, the IT Department handles all initial calls. For problems which may be more complex, or if time constraints require more immediate resolution, outsourced technical staff are brought in to resolve issues remotely or on site.

Training is an area that is lacking at this time. The IT Department has not had funding for technical training or staff training for several years. Over the past few years training has been limited to ad hoc training through Brown Bag Luncheon seminars or In-House Mentoring such as the Access Users Group. Some Microsoft application training has been provided through the use of Training Coupons. As users are getting more sophisticated, they are imagining more ways to use technology but they do not have the benefit of any formalized training to facilitate the need.

2. OBJECTIVES OF THE PROJECT:

- The Town of Lincoln's Information Technology Department wishes to hire a consultant or team of consultants capable of providing a town wide

comprehensive Five-Year Strategic IT Project Plan. This Strategic Plan must include 1) a comprehensive assessment of current conditions, 2) Recommended actions, 3) Cost estimates, 4) Prioritization of actions, and 5) an Implementation Plan that will be incorporated into the Capital Planning Process for FY2011 through FY2016.

- The Town generally seeks a Consultant(s) that has the following experiences and qualifications:
 - The consultant team shall possess no less than ten (10) years of professional experience in Information Technology (IT) consulting for municipal clients.
 - As noted above, the consultant may also be made up of a team that brings the necessary qualifications to the table. The consultant will be required to provide references of past IT Strategic Plans conducted.
- Ultimately for this project, the consultant shall develop a plan to interview all key personnel who utilize technology presently or who could benefit from the use of technology in the future from all of the relevant Town departments. Any managers that make decisions on IT, use technology on a daily basis (analysts, secretaries, assistants, etc.) or interact with citizens (inspectors, assistants, etc.) should be interviewed during this process. The consultant will conduct interviews and shadow certain positions to gain an in-depth understanding of how technology is used throughout the organization on a daily basis, and how it could more effectively assist in normal workflow as well as extenuating circumstances.
- This Project will require actively engaging the key constituent groups for their input during this process. Those groups are: 1) Internal Professional Staff, and 2) Town Boards and Committees, and 3) Lincoln Citizens. This will be done through a series of interviews, surveys and workshop-style interviews. The Proposal should provide details of how the Proposer will accomplish this task.
- Departments Interviewed:
 - Lincoln Town Offices
 - Town Administrator
 - Board of Selectmen
 - Finance and Accounting
 - Planning
 - Information Technology
 - Conservation
 - Assessors
 - Building Inspector
 - Tax Collector/ Treasurer
 - Town Clerk
 - Recreation Department
 - Representation of Relevant Boards and Committees
 - Fire Department
 - Police Department
 - Public Works
 - Library
 - Council on Aging

- o Pierce House
- o Lincoln Schools Business Offices
- o Water Department

3. ANTICIPATED SPECIFIC TASKS AND SERVICES

a. **Process** – the key to developing a credible IT Strategic Plan for Lincoln will be the comprehensive effort utilized to gather sufficient input from the 3 key constituencies of the Town: 1) Internal Professional Staff, 2) Boards and Commissions and 3) Citizen Input.

This information will come from a series of interactive activities including, but not necessarily limited to: 1) Surveys, 2) Interviews and 3) Public Forums. The data must then be categorized in a logical and systematic fashion and incorporated into the Strategic Plan as appropriate. The results must be published as an appendix to the final report.

Note: Lincoln Professional Staff will be available to aid in the logistics of reserving facilities and setting up forums and interviews, but the consultant will remain responsible for facilitating events, conducting interviews, gathering, quantifying, analyzing and reporting on all information gathered throughout this process.

b. **Network Infrastructure** – The Consultant must assess the current network infrastructure, including all data switches, hubs, router, appliances, LAN wiring within the facilities, WAN Cabling between the facilities, and include recommendations for appropriate improvements in the final report.

c. **Telecom Infrastructure** – The Consultant must assess the current telecom infrastructure and potentially make general recommendations regarding migrating to a hybrid VOIP System which would support modern phone functionality and unified communications. These recommendations must be included in the final report. Please note, the expectation is not for a detailed telecom plan.

d. **Servers and Server-Based Applications** – The Consultant must assess the current servers being utilized, including domain servers, mail servers, and application servers and make recommendations regarding management, maintenance and life-cycle of the devices in the final report. Server-based applications include MUNIS financial management applications, VADAR revenue applications, Patriot Properties assessment applications, Pamet Systems public safety applications, FireHouse fire reporting, Numara Track-IT! inventory and help desk, Exchange mail server and Outlook Web Access (OWA) remote e-mail access.

e. **Desktops** – The Consultant must assess the current fleet of Desktops, Laptops and Workstations, Operating Systems, Office applications and niche applications such as GIS, web development, etc that may have unique requirements. Observations and recommendations regarding deployment, patching, updating, upgrading, monitoring, maintenance and life-cycle must be included in the final report.

f. **Printers** – The Consultant must assess the current fleet of printers, copiers, multi-function printers, scanners, fax machines, ink-jet and large-format printer/plotters. Consider printing costs, maintenance costs, and make recommendations for potential cost savings through standardization, consolidation, etc in the final report.

g. **Storage and Backups** (servers only) – The Consultant must assess the current use of Direct Attached Storage (DAS), Storage Area Network (SAN), snapshot technology, disk-

to-disk and disk to tape backup and off-site storage strategies. This should differentiate between working snapshots, nightly back-ups and long-term archiving. Observations and recommendations must be included in the final report.

H. Web Page and Internet Access - The consultant must assess the existing Lincoln Web Page (www.lincolntown.org) and make recommendations based upon Design, Functionality, Ongoing Maintenance and Content Management. Functionality for consideration includes, but is not limited to meeting agendas, calendars, meeting minutes, e-Commerce, online billing, online GIS Mapping, online data retrieval, online permitting, blogging, streaming audio, streaming video, Podcasts, etc. Consideration must be given to time, effort and human resources required to support such recommendations. These may include keeping the services in-house, a committee of volunteers or outsourcing.

I. Document Archiving, Document Management, Document Retrieval, Records Retention, and e-Mail Archiving – In regards to Archiving, the Consultant must assess our current capabilities with the actual needs of the Town Clerk and other departments. In addition to archiving, management, retrieval and retention, the consultant must make observations and recommendations regarding e-mail archiving, particularly in light of Federal Rules for Civil Procedures, and include these in the final report.

J. Land Use – The Consultant must consider the synergies of work that flows between all Land Use offices including, but not necessarily limited to, Building Department, Planning Department, Conservation, Assessors, Zoning Board of Appeals, etc. and determine how to better utilize GIS and Database technologies to aid in streamlining an online process for managing permitting processes. Portions of this may be well-suited to the web functionality. Observations and recommendations must be included in the final report.

K. E-Mail – The Consultant must assess the current utilization of Microsoft Outlook and OWA as the primary e-mail tools for the Town's municipal functions. Though outgoing POP3 mail traffic cannot flow through the Firewall, employees are still permitted to access their web-based e-mail such as Comcast or Verizon. The Consultant must include observations and recommendations in the final report.

L. Social Networking (Chats, Blogs, FaceBook, Twitter, etc) – Currently there are no sanctioned uses for any Social Networking applications in Lincoln. Through the interactive process as described in paragraph a., the Consultant must report observations and recommendations regarding the possible uses of these Social Networking technologies in this municipal environment in the final report.

M. Collaborative Tools (SharePoint) – Currently there has been no interest in SharePoint or related collaborative tools. Based upon the results of the data gathered in the process described in paragraph a. the Consultant must report observations and recommendations, regarding collaborative tools, in the final report.

N. Business Continuity and Disaster Recovery – Currently there is no Business Continuity Plan in place. There is no generator at Town Offices. Images of Virtual Servers (Patriot and Vadar, at this time) are backed up, as is all server data. This data is stored on tape and nightly backups are taken off-site every evening. The Consultant must state observations and make recommendations in the final report.

O. Data Security – Currently the Town is using Symantec End Point Version 11 for anti-virus protection. The firewall is Watchguard, SPAM Filtering is by CommTouch. There is also a

VPN SSL box for remote access where appropriate. The Consultant must assess the current level of protection and make observations and recommendations in the final report.

P. Remote Access – Remote Access is available on a limited basis for IT, Software and Hardware service providers and some users. This is presently accomplished through the Watchguard SSL appliance, a Citrix client and Remote Desktop. The Consultant must make observations regarding the use of Remote Access for IT and select users, based upon need. In addition, Remote Access can be better utilized by in house IT staff for desktop troubleshooting at other locations. The Consultant must report recommendations in the final report.

Q. Software Licensing – The Consultant must review the current software licensing scheme and make recommendations that will assist the Town in reducing software licensing costs, while ensuring that we are in compliance. This section will also require recommendations in regards to migration or upgrades to newer operating systems or applications suites or the adoption and implementation of low-cost or free open-source software applications.

R. Policies and Procedures – Since the use of technology has evolved over time, and there have been no management issues in regards to the abuse of technology, there has been little demand for the use of standardized policies and procedures to date. The level of user sophistication, the widescale deployment of technology and the new levels of exposure to risk no longer make this a practical business practice. Having observed the Lincoln computing environment, the Consultant must make recommendations regarding standardized IT policies and procedures in the final report.

S. Help Desk & Reporting – IT has recently installed Numara Track-IT! Version 8.5 on a Virtual Server. The Consultant should be prepared to make recommendations how to best utilize this application.

T. IT Staffing – Currently the Lincoln IT Department is one individual, the IT Director. This position is responsible for everything, from web design and maintenance, to troubleshooting, break/fix of desktops, etc. After having observed the entire IT infrastructure and operation, and after having interviewed everyone, the Consultant must state observations and recommendations regarding IT Staffing, including combinations of Full Time employees, Part Time employees, contract employees, vendors, etc. and include their findings in the final report.

U. IT Space Requirements – Currently the IT Department is housed on the second floor of Town offices. The consultant must make recommendations as to how to optimize the current space, or to suggest viable alternatives in light of the crowded Town Office facility.

V. Emerging Technologies – Having observed Lincoln's current computing environment, the Consultant is expected to make general recommendations regarding the potential benefits of new or emerging technologies, or technologies that are coming down in price or scalability for a small operation such as Lincoln's.

W. Strategic Plan Document - The Consultant shall refine, finalize and deliver to the Town electronic and hard copies of the final Strategic Planning document as described above.

4. PROPOSED PROJECT SCHEDULE:

The anticipated project duration of the IT Strategic Planning effort is no more than four (4) months after the Town directs the selected Consultant(s) to begin the project.

- April 30, 2009 Date of issue of the RFP
- May 8, 2009 Deadline for submission of written questions
- May 13, 2009 Response to questions
- May 15, 2009 Proposals Due
- May 22, 2009 Finalists Selected
- May 26-29, 2009 Finalists Interviewed as Needed; Recommendation Devised
- June 1, 2009 Recommended Proposal Submitted to Board of Selectmen
- Week of June 1, 2009 Contract Awarded and instructed to proceed
- September 3, 2009 Draft Plan Submittal Due
- October 2, 2009 Final Report Due (Project Completion Date)

5. PROJECT BUDGET:

The estimated maximum budget is \$30,000

**RFP FORM A
SIGNATURE AFFIDAVIT**

Note: This form must be returned with your proposal response.

PART I:

In signing this proposal, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other Proposer competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other Proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this proposal, hereby agrees with all the terms, conditions, and specifications required by the Town in this Request for Bid, and declares that the attached proposal and pricing are in conformity therewith.

Proposer shall provide the complete information requested below. Include the legal name of the Proposer and signature of the person(s) legally authorized to bind the Proposer to a contract.

Proposal Invalid Without Signature

SIGNATURE OF PROPOSER _____ DATE _____

NAME AND TITLE OF PROPOSER _____

COMPANY NAME _____

TELEPHONE _____

FAX NO. _____

E-MAIL _____

ADDRESS _____

Person to Be Contacted If There Are Questions about Your Proposal (if different from above)

NAME _____ TITLE _____

TELEPHONE _____

FAX NO. _____

EMAIL _____

RFP FORM A
PART II: RECEIPT FORMS and SUBMITTAL CHECKLIST

The undersigned hereby acknowledges the receipt and/or submittal of the following forms (Initial all applicable forms):

Request for Proposals	Initial to acknowledge receipt of RFP Documents
Section A: Administrative RFP Information and Conditions	
Section B: Project Information and Specifications	
Attachment A: Sample Contract for Services	
Addendum No. ___ Dated: _____	
Addendum No. ___ Dated: _____	
Addendum No. ___ Dated: _____	

Tab #	Contents	Required Submittals: Initial All Submitted Documents
Tab 1	General Information and Signatures a. Signature Affidavit - Parts I and II (*RFP Form A) b. Consultant Profile Information (*RFP Form B)	
Tab 2	Executive Summary	
Tab 3	Qualifications a. Qualifications Overview b. Organization Management Approach c. Key Staff	
Tab 4	Experience, Past Performance, Litigations a. General Company Information b. Experience c. Disclosure of Contract Failures, Litigations	
Tab 5	References (*RFP Form C)	

 Company Name (print or type)

 Proposer's Name and title (print or type)

 Date

 Signature

**RFP FORM B
CONSULTANT PROFILE**

1. Proposing Company Name:

2. FEIN _____ OR SOCIAL SECURITY NO. _____

(If Sole Proprietorship) SSN to be provided if awarded the contract

DUNN AND BRADSTREET NO. _____

3. Form of Organization (check one):

- Corporation Limited Liability Company General Partnership
 Sole Proprietor Unincorporated Association Other:

4. Location of Main Office:

ADDRESS _____

TOWN/CITY _____ STATE _____ ZIP + 4 _____

5. Location of Office servicing Town of Lincoln account:

ADDRESS _____

TOWN/CITY _____ STATE _____ ZIP + 4 _____

6. Principal Information and Contact:

NAME _____ TITLE _____

TELEPHONE 1 _____ TYPE: Cell Office

TELEPHONE 2 _____ TYPE: Cell Office

TOLL FREE TEL _____ TYPE: Cell Office

FAX: _____ E-MAIL ADDRESS _____@_____

7. Contact Person in the event there are questions about your proposal:

NAME _____ TITLE _____

TELEPHONE 1 _____ TYPE: Cell Office

TELEPHONE 2 _____ TYPE: Cell Office

TOLL FREE TEL _____ TYPE: Cell Office

FAX: _____ E-MAIL ADDRESS _____@_____

8. Mailing address where Town purchase orders/contracts are to be mailed and person the Department can contact concerning orders and billing:

NAME _____ TITLE _____

ADDRESS _____

TOWN/CITY _____ STATE _____ ZIP + 4 _____

TOLL FREE TEL _____ TYPE: Cell Office

FAX: _____ E-MAIL ADDRESS _____@_____

**RFP FORM C
CONSULTANT REFERENCES**

FOR VENDOR: _____

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for four (4) or more installations with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

Company Name _____

Address (include ZIP) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Company Name _____

Address (include ZIP) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Company Name _____

Address (include ZIP) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Service(s) Used _____

**RFP FORM C
CONSULTANT REFERENCES**

FOR VENDOR: _____

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for four (4) or more installations with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

Company Name _____

Address (include ZIP) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Company Name _____

Address (include ZIP) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Company Name _____

Address (include ZIP) _____

Contact Person _____ Phone No. _____

Service(s) Used _____

Service(s) Used _____

**RFP FORM D
CERTIFICATION OF TAX COMPLIANCE**

Pursuant to M.G.L. Chapter 62C, Section 49A, I certify under the penalties of perjury that I, to the best of my knowledge and belief, have filed all state tax returns and paid all state taxes required under law.

CONTRACTOR:

BY: _____

Dated: _____

Federal Tax ID#: _____

**RFP FORM E
CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under the penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.

CONTRACTOR:

BY: _____

Dated: _____