

# **REQUEST FOR PROPOSALS (RFP)**

## **INFORMATION TECHNOLOGY STRATEGIC PLAN**

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City of Mequon, Wisconsin

March 10, 2021

The City of Mequon, Wisconsin (pop. 24,144) is seeking the assistance of a consultant to develop an **Information Technology Strategic Plan** to **guide the organization through the next five years**, and also **to create a more detailed IT infrastructure plan and design**.

**Sealed proposals are to be received by Justin Schoenemann**, Assistant City Administrator, no later than 4:00 p.m. on Monday, April 12, 2021 and **must be in digital (Microsoft Word or PDF)**. Late proposals will not be accepted nor will additional time be granted to any consultant. All proposals and accompanying documentation will become the property of the City and will not be returned.

## **Section I. General Information**

- A. Request for Proposal Objective – The purpose of this RFP is to solicit proposals from qualified consultants to prepare an information technology strategic plan and perform a structural evaluation. The City will consider proposals from single consultants or from multiple consultants working as a team. The ideal candidates will possess recent experience in information technology strategic planning. They will be excellent communicators and write clearly and concisely. They will have experience in the public sector, and have worked with municipalities comparable to and larger than the City of Mequon, Wisconsin in population, staffing, infrastructure and other relevant categories.
- B. **Overview of the City and Current Information Technology**
1. Facilities – The City presently owns and manages four (4) primary facilities: City Hall, Public Safety Building (combined Police & Fire), East Side Fire Station, and Public Works Facility.
  2. Departments & Staff – The City of Mequon employs 114 full-time employees, roughly 9 part-time and 40 seasonal employees across seven (7) departments: City Administrator's Office, City Clerk's Office, Finance, Public Works, Community Development, Police Department, and Fire Department.
  3. Workstation and Server Environment – The City of Mequon is equipped with 6 Dell servers, 1 windows server and 1 IBM server. Additionally, the City has approximately 132 Lenovo, HP, Dell & custom workstations and laptops. The operating systems consist of MS Windows Servers and Windows 10 Pro. The City also has 2 HP based Servers, as well as a number of backup systems.
  4. Wired Network – The network infrastructure consists of 12 Cisco, Juniper, Trendnet, Asus Nighthawk, Netgear, Linksys switches. Additionally, the City has ASA routers, Firewalls, Barracuda mail and web filter devices.
  5. Wireless Network Ubiquity and Asus base routers and access points.
  6. Connectivity – Fiber connectivity between City Hall, Public Safety, Public Works Departments, and Eastside Fire Station. Switches are primarily PoE with gigabit connectivity on all ports. There are also some 100Mbps port switches still in use.
  7. Voice – The City utilizes a Mitel VoIP phone system.
  8. Significant Business Systems
    - a. Enterprise Resource Planning (Munis)
    - b. Office Software Suite (Microsoft Office 365)
    - c. Agenda Management System (Accela)
    - d. Website (MuniCode)
    - e. Audio Video Broadcasting System (HyperCaster & InfoView)

- f. Geographic Information System (ArcGIS)
  - g. Permitting and Inspections (Black Bear)
  - h. Police and Fire Records Management System and Dispatch System (ProPhoenix)
  - i. Computer Aided Design System (AutoCAD Civil 3D and AutoCAD LT)
  - j. In-Car & Body Camera Video System (Watchguard)
  - k. In-House Surveillance Monitoring System (Hikvision)
9. Present IT Staffing – One part-time contracted Information Technology Coordinator, one full-time Public Safety Technology Specialist, and one part-time Information Technology Intern.
  10. IT Funding - The City maintains an Information Services Division operating budget of \$334,767, which covers some staffing expense, contracted services, and projects. Additionally, Departments fund routine and on-time project expenses through their own dedicated budgets.

## **Section II. Scope of Services**

- A. Strategic Plan Objective – The objective of the strategic plan includes but is not limited to creating a well-documented plan to guide the organization over the next three to five years in planning, procuring, implementing and managing current and future technology investments and resources related to Information Services provided by the City of Mequon. The City seeks an evaluation that will highlight current strengths and weaknesses as well as identify, prioritize, and cost the projects that the City should focus on over the next five years. The primary question that the City seeks to answer with this strategic plan is “**What is the most effective way to spend the resources that the City now has available?**” The plan should involve the results of a thorough analysis of the following:
  1. Existing infrastructure, staffing, funding, applications, business systems, projects, processes, resource deployment and other investments and resources currently used by the City (for each existing application that is analyzed, staff would like to determine whether or not Mequon is actually working on the right applications).
  2. Interviews with one-two representatives from each department’s leadership, two current information services staff, and two key contracted services providers.
  3. Identification, prioritization and cost analysis of projects that the City should undertake over the next five years.
  4. Sufficiency of existing relationships, maintenance strategies, replacement cycles and opportunities for enhancement of these strategies.
  5. Practical and relevant private and public sector industry standards for disaster recovery, help desk/customer service, staffing, uptime, etc.
  6. Identification of needs to accommodate current and future technology requirements such as data storage and management, legal requirements, security requirements, etc.
  7. Options for expanding and improving connectivity between City facilities to accommodate necessary and anticipated increases in data transmission.
  8. Current policies and service level agreements, and identification of any necessary or recommended policy directives.
  9. Identification of strategies and recommendations for utilizing available and emerging technologies to improve commercial, informational, political and social interaction between the City and its residents.

The following deliverables are to be provided by the consultant. Additional deliverables may be identified during the initial meetings between the consultant and the City.

1. An Executive Summary of discovery and recommendations for the City's Common Council and Executive Management Staff.
2. A five-year strategic plan addressing the topics outlined in this RFP and any others identified in the process of stakeholder discussions. This plan should be designed to succeed within the City's anticipated available budget and indicate if more resources are needed or should be proposed for consideration. Include option(s) to provide third-party assistance in the procurement, configuration, and implementation of key system deficiencies that may be identified during the evaluation.
3. A tactical project plan outlining projects, asset replacement cycles, and key improvements by priority that includes costs both initial and ongoing, staff required for both initial implementation and sustainable management and perceived benefits and risk of both successful implementation and no implementation at all.
4. An infrastructure design and a specific detailed migration plan to allow the City to implement any such additional infrastructure by the end of 2026. This plan should also address creating a more flexible and cost-effective hardware infrastructure.
5. Comprehensive documentation of discovery and recommendations.

### **Section III. Contact Information**

#### **A. Official Contact:**

Justin Schoenemann  
Assistant City Administrator  
City of Mequon  
11333 N. Cedarburg Road  
Mequon, Wisconsin 53092  
[jschoenemann@ci.mequon.wi.us](mailto:jschoenemann@ci.mequon.wi.us)  
Phone: (262) 236-2942

- B. Questions Regarding the RFP – Consultants who request a clarification of the RFP requirements may submit written questions via email by 12:00 p.m. (CDT) on Friday, March 26, 2021. Questions should be submitted via e-mail to the City contact listed above. Any oral communications will be considered unofficial and non-binding by the City. Unauthorized contact regarding this RFP with other City employees may result in disqualification. The City reserves the right to refrain from answering any questions for any reason. However, if the City chooses to answer a question submitted by a proposer, a copy of the question and answer will be submitted to the inquiring applicant and all individuals and/or firms.

### **Section IV. RFP Proposal Requirements**

- A. Cover Letter – All proposals must include a cover letter signed by a duly constituted official legally authorized to bind the applicant to both its proposal and cost schedule. The cover letter must include the following statements and information:

1. "Proposal may be released in total as public information in accordance with the requirements of the laws covering same" (Any proprietary information must be clearly marked).
2. "Proposal and cost schedule shall be valid and binding for 180 days following proposal due date and will become part of the agreement that is negotiated with the City."
3. Company name, address, and telephone number.
4. Name, title, address, e-mail address and telephone number of contact who is authorized to bind the company into contractual agreements and with whom correspondence should be directed.

B. General Consultant Information

1. Company name
2. Location of headquarters and field offices, if any
3. Number of full-time personnel
4. Length of time in business
5. Length of time providing the proposed services
6. Gross revenue for the prior fiscal year
7. Percentage of gross revenue generated by the proposed services
8. Total number of clients
9. Number of public sector clients
10. Specification as to which office would service this account (if applicable)
11. An explanation of any contract that has been terminated for default during the past five years, including name, address and telephone number of contracting party (if no such terminations for default have occurred, declare so)
12. An explanation of any contract that has been terminated for convenience, nonperformance, non-allocation of funds, or any other reason which termination occurred before completion of the contract during the past five years, including address and telephone number of contracting party (if no such terminations have occurred, declare so)

C. Project Methodology

1. Proposal summary including qualifications and unique attributes
2. A description of the project's methodology

D. Task Area Descriptions – Please provide a written explanation (not to exceed three pages in total) of your overall approach to the following task areas:

1. Development of existing technology inventory
2. Involvement of stakeholders in the strategic plan discussion
3. Assessment of current strengths and weaknesses
4. Infrastructure evaluation
5. Staffing level review

E. Project Schedule & Work Plan – Provide a detailed project implementation plan that includes:

1. A Gantt chart showing beginning and end dates of all tasks (the actual project start date will be determined during finalization of a formal engagement agreement)
2. A table listing consultant staff assignments and proposed labor hours for all tasks

3. A brief description of each task and its work products
  4. A description of each proposed deliverable
- F. Detailed Project Staff - This should contain any staff that will participate in the project, including:
1. Names
  2. Positions
  3. Qualifications
  4. Education
  5. IT experience (years)
  6. Length of time with the proposing firm
  7. Special skills or technical qualifications relevant to the project
  8. Anticipated level of involvement
- G. Client References - Please list up to ten (10) public or private sector clients for whom your firm has performed strategic planning or other services relevant to this RFP over the past five years, including:
1. Customer/Client name
  2. Contact
  3. Title
  4. Phone number
  5. Address
  6. Number of employees
  7. Service description
  8. Contract amount
  9. Start and completion dates
- H. Fee Schedule - A detailed, itemized schedule including estimated hours, rates, and overall project costs not to be exceeded without an approved change order. Pricing should be broken down so that the City can differentiate between strategic and tactical planning separate from infrastructure evaluation.
- I. Non-Collusion Form - A signed Certificate of Non-Collusion (Attachment A).

## **Section V. Evaluation & Selection**

The RFP Coordinator and other staff will evaluate the submitted proposals. The evaluators will consider how well the consultant's proposed solution meets the needs of the City as described in the consultant's response to each requirement. It is important that the responses be clear and complete so that the evaluators can adequately understand all aspects of the proposal. The evaluation process is not designed to simply award the contract to the lowest cost consultant. Rather, it is intended to help the City select the consultant with the best combination of attributes, including price, based on the evaluation factors. The City reserves the right to require that a subset of finalist consultants make a presentation to a selection team.

The procurement schedule for this project is as follows:

<b>Project Milestone</b>	<b>Date/Anticipated Completion</b>
Release RFP to Consultants	March 10, 2021
Consultant Questions (if any) Due	March 26, 2021 (12:00 p.m.)
Answers to RFP Questions Distributed	April 1, 2021
Proposal Responses Due	April 12, 2021 (4:00 p.m.)
Virtual Finalist Interviews	April 22, 2021
Consultant Selection Completed	April 27, 2021
Contract Award	May 11, 2021
Contract Execution	May 12, 2021
Work Commences	May 2021
Strategic Plan/Network Evaluation Complete	Fall 2021
Final Acceptance & Presentation	Fall 2021

The City will evaluate proposals based on experience performing development-related and/or operational analyses for municipal governments or other similar authorities, the experience and qualifications of the proposed staff that will administer the City's analysis, the quality and thoroughness of the proposals and references/recommendations from past clients. The City will also take price into consideration in determining which proposal is most advantageous.

The City will review all proposals and may select one or more finalists for interviews. The City may also require the submission of supplemental materials. The successful contractor(s) will be required to enter into an agreement for professional services with the City of Mequon, a copy of which is enclosed as **Attachment B**. Proposals may be withdrawn at any time, and withdrawal of a proposal will not prejudice the right of a proposing firm to file a new proposal.

The City of Mequon reserves the right to accept or reject any or all proposals, to waive minor informalities, to cancel, delay or suspend all or any part of this RFP and to award a contract deemed to be in the best interests of the City. Further, the City reserves the right to issue subsequent requests for proposals, postpone opening for its own convenience, remedy technical errors or waive non-material irregularities in the RFP process and negotiate with any, all or none of the proposing firms.

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**ATTACHMENT A:**

**PROPOSAL SUBMISSION FORM  
REQUEST FOR PROPOSAL (RFP)  
INFORMATION TECHNOLOGY STRATEGIC**

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**CERTIFICATE OF NON-COLLUSION: REQUIRED FORM**

The undersigned certifies under penalties of perjury that this bid 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.

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Signature of Person Submitting Contract/Bid

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Date

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Name of Business

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**ACKNOWLEDGEMENT OF ADDENDA:**

Acknowledge the receipt of addenda, if any (indicate date(s)):\_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.