



CONTRA COSTA
WATER DISTRICT

REQUEST FOR PROPOSAL #1624
SharePoint Implementation and Training Services
Period of Performance April 30, 2016 through September 16, 2016

Board of Directors
Joseph L. Campbell
President
Lisa M. Borba
Vice President
Bette Boatman
John A. Burgh
Connstance Holdaway
General Manager
Jerry Brown

GENERAL INFORMATION

The Contra Costa Water District (District) is requesting proposals from highly qualified service providers interested in providing the described technical services related to the implementation and utilization of Microsoft (MS) SharePoint software, with contract execution scheduled to commence on or about April 30, 2016.

The District is a special district formed in 1936 under the State of California's State Water Code. The District serves a portion of Contra Costa County encompassing over 137,000 acres in the central and eastern portions of the County and serves water to approximately 500,000 people within the County.

No faxed or email bids will be accepted. Bidders must also provide with their hard copy proposal (paper) an electronic version on a flash drive containing all required documentation in Word/Excel PDF format.

INTRODUCTION

The intent of this Request for Proposal (RFP) is to identify a qualified firm or individual offering the highest quality of service, while providing the best value to the District. The District's objective is to utilize SharePoint to create a company-wide intranet to manage electronic documents, facilitate custom workflows for document approval, improve collaboration, and disseminate information across the enterprise.

A service provider is needed to lead the District in the implementation of SharePoint, providing expertise based on experience and knowledge of industry best practices to reach the following milestones:

- 1) Design and build Phase 1 production SharePoint environment, including:
 - a. SharePoint farm configuration(s):
 - i. Database configuration for SQL-Server
 - ii. SharePoint application server
 - iii. SharePoint data backup and recovery
 - b. Develop a "front-end" user portal that emulates visual aspects of current employee website (see Attachment 3).
 - c. Migrate a district-wide network file share into document libraries and team sites where applicable.
 - d. Complete the design and implement two workflows from previous proof-of-concept project.
 - e. Build department site, including migration of department file share, for the Information Systems Division.

2) Design and implement on-site end user training program for system roll out
District-wide

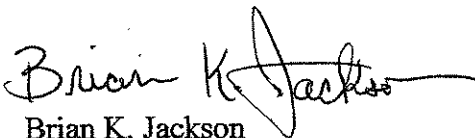
The goal is for the first phase implementation to be completed by September 16, 2016, with a contract extension option for the next phase of the project, to be exercised at the District's discretion. The extension option will cover the second release to include: migration of five (5) additional department file shares and implementation of one (1) additional workflow from the proof-of-concept system.

The attached document describes the specific scope of work and provides questions that are requested to be addressed within your proposal. Interested parties are encouraged to submit a comprehensive proposal describing their ability to provide the requested services. The responses should include a summary of experience in providing similar services. While the format must be consistent with the requirements of this RFP, you are invited to include additional information that would be beneficial to the selection process under Section 7, Additional Information.

The District will make every effort to administer the proposal process in accordance with the schedule of dates outlined in this RFP; however, the District reserves the right to modify the activities, timeline or any other aspect of the process as deemed necessary by the District's SharePoint Governance Committee. By requesting proposals, the District is in no way obligated to award a contract or pay the expenses of proposing firms in connection with the preparation or submission of their proposal.

The award of a contract shall be contingent on the requisite approvals. The decision to award the contract to a particular provider will be based 50% on content of submitted proposals and 50% on vendor interviews.

Finalists will be selected for interview on many factors, including but not limited to: provider's experience, service levels and approach, proposed relationship manager and team members, and cost to the District. No single factor will determine the final award decision.



Brian K. Jackson
Purchasing Officer
Contra Costa Water District

PROPOSED SCHEDULE

Release of Request for Proposal	March 7, 2016
Written questions due	March 15, 2016
Response to question	March 22, 2016
Proposals due	March 25, 2016
Evaluation and selection of finalists	March 30, 2016
Interviews of finalists	Week of April 4, 2016
Selection of provider	April 15, 2016
Contract to be approved	April 30, 2016
Commence implementation	May 9, 2016
Anticipated project completion	September 16, 2016

CONTRACTUAL TERM

The District anticipates a six-month contract commencing April 30, 2016, with the option for a four-month extension for the next phase of the project. Submittal of a proposal constitutes acceptance of standard District contract terms and conditions. No negotiations of terms and conditions including insurance and indemnification will be considered. A sample of the Standard Services Contract appears as Attachment 1.

The District's standard form contract will represent the binding agreement between the parties. The District reserves the right to reject any and all proposals and supplemental documents. If the selected provider does not execute an agreement within ten (10) business days after being notified of selection, the District may give notice of intent to select the next most qualified provider.

ADDITIONAL DISTRICT INFORMATION

Information about the District and its financial operations can be found on the District's website at www.ccwater.com.

REQUIRED SERVICES AND FORMAT OF PROPOSAL

Five (5) copies (paper) along with One (1) flash drive of the proposal must be submitted in a sealed envelope or package bearing the title "CCWD SharePoint Implementation and Training Services" along with the provider's name, address and contact information and be delivered to the Purchasing Officer, 1331 Concord Avenue, Concord CA 94520 no later than 4:00 PM on Friday, March 25, 2016.

It is the responsibility of the proposing firm to ensure that the proposal arrives on time and at the specified location. Any proposals received after the above time will be returned unopened. All submitted proposals and information included therein or attached thereto shall become a public record upon delivery to the District's Purchasing Officer. No fax or electronic submittals will be accepted.

Written questions can be submitted by e-mail, at least seven (7) days prior to the proposal due date to the District's SharePoint Project Manager, Stephen Sandberg at ssandberg@ccwater.com in order to clarify any matters relating to this RFP. Questions and the District's responses will be provided through an addendum which will be transmitted to all firms.

Once all qualifying proposals have been evaluated, selected finalists will be invited to the District's office in Concord for interviews and presentations. It is anticipated that interviews and presentations will be scheduled the week of **April 4, 2016**. The District reserves the right to interview finalist firms at its discretion.

In order for the District to adequately compare and evaluate proposals objectively, all proposals must be submitted in accordance with the following format:

1. **Title Page/Cover:** Two (2) printed pages maximum. It should include the name of the proposing firm, its principal business address where the relationship will be managed, and a contact person with telephone number and e-mail address that will be available during the proposal submission and review process. The letter should address the firm's willingness and commitment, if selected, to provide the services, and why the firm believes it should be selected. The letter should be signed by the Relationship Manager assigned to the District's account(s).
2. **Firms' Experience:** Five (5) printed pages maximum. Respond to the following sections:
 - a. *Experience:* Describe the firm's experience with the SharePoint system and in providing similar services to those previously described. Provide up to three (3) references, including a brief description of the services provided, how long such services have been provided, and a contact person and telephone number for each client described.
 - b. *Assigned Staff:* Describe the individual or team that will be assigned to service the relationship. Describe individual roles, responsibilities and related experience. Once the names of the Relationship Manager and project team have been submitted, any proposed substitutions must be approved in advance by the District. **Members of the project team must be permanent employees of the submitting firm.**
3. **Technical Services** - Provide pages as necessary to explain your approach to providing the District with the following services:
 - a. **SharePoint Implementation**
 - i. Design user portal
 - ii. Migrate District-wide network file share
 - iii. Implement workflows for identified business processes
 - iv. Create department site
 - v. Create team site template
 - b. **SharePoint/Third Party Tools** – Propose solutions for:
 - i. Migrating documents from Windows file shares to document libraries with metadata
 - ii. Backup and recovery

- iii. Antivirus
- 4. **Training Program** – Three (3) printed pages maximum
 - a. Design a roll-out training program for District personnel, including how to facilitate the cultural change (embracing technology) and how to tailor training to meet user type (upper management vs. heavy system user)
- 5. **Pricing** – To be provided via completion of the Cost Evaluation Form (Attachment 2)
 - a. List all proposed costs for the requested services. The proposal shall also separately reference the cost for pricing increases should an option be requested to extend the contract for an additional one-year period to provide additional support services. Any charge for requested services not addressed in your proposal will not be allowed during the course of the contract, unless preapproved by the District.
- 6. **Additional Information** – Four (4) printed pages maximum
 - a. Describe any other information not previously mentioned that the firm believes should be given consideration.

EVALUATION OF PROPOSALS

Proper Submission of Proposal: Late submissions or delivery via facsimile or email will not be considered.

The following criteria will be used in evaluating proposals:

- A. **Estimated Integration Project Cost (50%):** As described in Attachment 2, the proposal shall include a Sample Integration Project for performing the work as described in this RFP. The ratio method will be used for scoring proposal costs. The proposal with the lowest cost receives the maximum points allowed. All other proposals will receive a percentage of the points available based on their costs relationship to the lowest. This will be determined as follows:

$$\frac{\text{Lowest Cost}}{\text{Cost Being Evaluated}} \times \text{Maximum Points Available} = \text{Awarded Points}$$

- B. **Approach to Work (20%):** Includes the understanding of the scope of work and reasonableness of the Estimated Integration Project cost provided in Attachment 2, proposed project management and cost control, and unique/creative approaches to work. This section should clearly communicate the benefits to the District of the proposer's project approach, highlighting the described technical services required, and proposed plans for system analysis, implementation and training.
- C. **Specialized Experience and Capabilities (25%):** Includes the experience of key personnel directly related to this project, estimated labor hours to be provided and evidence in providing similar services.

- D. **Overall Proposal Quality and Other Considerations (5%):** Includes general responsiveness, clarity of presentation, proposal quality, comments received from references, and any factors that are in the District's best interest to consider that were not previously described.

Following the evaluation process, all received proposals shall be ranked based on the quantitative evaluation scoring criteria. The District intends to enter into negotiations with the top-ranked firm as determined by this documented evaluation process. Negotiations shall include scope of work, contract schedule, technical approach and price. Should negotiations with the top-ranked firm fail to achieve a mutually acceptable agreement between the District and the top-ranked firm, the District will terminate the negotiations and initiate negotiations with the second-ranked firm.

FINAL COMMENTS

The District reserves the right to reject any and all proposals, cancel all or part of this RFP, waive any minor irregularities, and request additional information from those proposing.

The District's decision to award a contract will be based 50% on the criteria and weighting as stated under "Evaluation of Proposals", and 50% on the vendor interviews. Firms will be selected to be interviewed based on evaluation of the proposals. The District expressly reserves the right to accept or reject any exceptions taken or alternatives proposed by your firm.

In submitting this proposal, your firm hereby certifies that it is genuine, and submitted without any collusion to secure any advantage over any other firm. We appreciate the efforts all the firms and their respective staffs have put forth in responding to the SharePoint Implementation Services Request for Proposal.

- Attachments:
- 1) Standard Services Agreement
 - 2) Cost Evaluation Form
 - 3) Current Employee Website Example Screenshots

CONTRA COSTA WATER DISTRICT
Consulting Services Agreement

THIS AGREEMENT for consulting services is between Contra Costa Water District ("District") and _____ ("Consultant"). Consultant's address is _____, telephone _____, and fax number _____. Consultant is a [] corporation, [] partnership, [] individual, having taxpayer's identification or Social Security number _____, and professional license class and number _____.

1. The Agreement. District and Consultant agree that Consultant shall perform consulting services for District on the terms and conditions herein set forth in connection with District's _____ project number _____ for _____. The following documents are attached hereto and are a part of this Agreement:

- Attachment A - Scope of Work
- Attachment B - Consultant's Rates and Charges
- Attachment C - General Contract Provisions

This Agreement, including said attachments, constitutes the entire agreement between the parties and supersedes any prior proposals, representations, or understandings. This Agreement may be modified only by a written amendment signed by each party.

2. Time of Performance. Unless otherwise stated in Attachment A, Consultant is authorized to commence performance of this Agreement upon its execution by the District and receipt of a Notice to Proceed from the District. Consultant shall complete all services covered by this Agreement no later than _____, unless this date is extended by District in writing. If Consultant fails to complete the services by said date, Consultant shall pay District as liquidated damages \$ _____ per day of default.

3. Payment. Consultant shall at convenient intervals not more frequently than monthly submit itemized statements of services performed at the rates and charges in Attachment B. District shall pay for work satisfactorily performed within thirty (30) days after receipt of a statement. The total amount payable by District for Consultant's services pursuant to the Agreement shall not exceed \$ _____ without the prior written approval of the District.

4. Termination. District may terminate this Agreement at any time by _____ days prior written notice to Consultant. Upon termination, District shall pay Consultant for all amounts due for service rendered up to the date of termination.

Dated _____

CONTRA COSTA WATER DISTRICT

By: _____

Title: _____

CONSULTANT

By: _____

Title: _____

Consulting Services Agreement
Between Contra Costa Water District (District) and
_____ (Consultant)
Dated _____

SCOPE OF WORK

Consultant shall provide:

- (Briefly describe service or services)

District shall provide the following services and facilities unless otherwise specified in any Task Order issued hereunder.

- (Describe District obligations, if any)

EXAMPLE

Consultant shall provide planning and engineering services which may include the following without limitation:

- Provide information on matters concerning urban development in East Contra Costa County, related to the impacts of potential needs for water services.
- Revise and update information in the Draft East County Water Services Status Report.
- Provide information concerning circulation, transmission, and distribution systems

District shall provide the following services and facilities unless otherwise specified in an Task Order issued hereunder.

- Timely access to land for field work;
- Reports, contracts, maps, and other data in District's possession necessary for completion of the services.

Consulting Services Agreement
Between Contra Costa Water District (District) and
_____ (Consultant)
Dated _____

CONSULTANT'S RATES AND CHARGES

Position Title (Additional description, if necessary) \$ _____ per hour
Position Title (Additional description, if necessary) \$ _____ per hour
Position Title (Additional description, if necessary) \$ _____ per hour

EXAMPLE

Principal:	Development and Forensic Consulting	\$160.00 per hour
Principal:	Engineering/Land Planning/Surveying	126.00 per hour
Manager II:	Engineering/Planning/Project	126.00 per hour
Manager I:	Engineering/Planning/Project	108.00 per hour
Senior Professional *		90.00 per hour
Associate Professional *		75.00 per hour
Assistant Professional *		63.00 per hour
Drafter - Designer/Computer Technician		54.00 per hour
Secretary/Clerk/Technical Assistant		36.00 pre hour
One (1) Person Survey Crew		90.00 per hour
Two (2) Person Survey Crew		145.00 per hour
Three (3) Person Survey Crew		208.00 per hour

* Applies to all professional staff: Engineers, Planners, Surveyors, Architects and Landscape Architects

Consulting Services Agreement
Between Contra Costa Water District (District) and
_____ (Consultant)
Dated _____

GENERAL CONTRACT PROVISIONS

Each of the following provisions are incorporated in and are part of the above-captioned Consulting Services Agreement (Agreement).

1. Consultant an Independent Contractor. Consultant shall perform the consulting services under the Agreement as an independent contractor and not as an employee of District. Consultant shall be wholly responsible for the methods of performance. District shall have no right to supervise Consultant's performance, but shall have the right to observe it. Consultant shall work closely with District in performing the services.

2. Insurance. Consultant shall provide and maintain at all times during the performance of the Agreement the insurance listed below which insurance shall name District, its Directors, officers, and employees as additional insured on items (b) and (c). Consultant shall promptly furnish to District certificates of insurance and an endorsement to the policy evidencing that all described coverage is primary with respect to any other valid and collectible insurance possessed by the District. The District's insurance shall be considered excess insurance only. Consultant shall provide 30-days prior written notice to District of policy lapse, cancellation, or reduction or other material change in coverage.

- a) Worker's Compensation and Employer's Liability Insurance for protection of Consultant's employees as required by law and as will protect Consultant from loss or damage because of personal injuries, including death to any of its employees; Consultant shall require any subcontractor to provide evidence of such insurance as required by the State of California.
- b) Comprehensive Automobile Liability Insurance providing bodily injury liability and property damage, to protect Consultant and District against all liability arising out of the use of any owned, leased, passenger or commercial automobile, limits of liability shall not be less than \$1,000,000 combined single limit and \$2,000,000 aggregate.
- c) Commercial General Liability Insurance as will protect Consultant and District from any and all claims for damages for personal injuries, including death, or for damages to or destruction of the property of others, which may arise from the Consultant's operations under the Agreement. Said policy shall cover the indemnity provisions under the Agreement and shall provide a minimum of \$1,000,000 combined single limit coverage for each occurrence and \$2,000,000 aggregate.
- d) Professional Liability Insurance protecting Consultant and District, against claims arising out of negligent acts, errors, or omissions of Consultant pursuant to the Agreement, in an amount not less than \$1,000,000 combined single limit coverage and \$2,000,000 aggregate, on a claims made basis with a continuation of coverage extension for two years.

3. Payment of Prevailing Wages. If any personnel of Consultant or a subcontractor of Consultant performs work under the Agreement for which the general prevailing wage has been determined by the Director of the Department of Industrial Relations, consultant or subcontractor shall pay the prevailing wage for such work and shall comply with all applicable provisions of the California Labor Code Section relating to public works (Section 1720 and following).

4. Records and Documents. Consultant shall deliver to District all records, data and reports prepared or obtained in the performance of the Agreement which shall be and remain the property of District. Consultant shall permit District and its authorized representatives to examine, re-examine, make excerpts, transcribe and copy Consultant's books, documents, papers, materials, payrolls, records, accounts, computer disks, tapes and any and all data relevant to the Agreement at any reasonable time within three years after final payment under the Agreement. Consultant shall also permit District and its authorized representatives to audit and verify statements, invoices or bills submitted by Consultant pursuant to the Agreement. Consultant shall provide such assistance as may be reasonably required in the course of such examination and audit.

5. Compliance with Laws and Regulations. In the performance of the Agreement, Consultant shall comply with all applicable laws, statutes, ordinances, rules and regulations whether Federal, State or local, and shall also comply with the CCWD Consultant Safe Practices Handbook at all times when present on CCWD property or at the site(s) of public works being installed, altered, repaired or removed for the District. The signature page of the CCWD Contractor Safe Practices handbook shall be signed by the Consultant and submitted to the District. The Consultant shall provide copies of the Handbook to all Sub-Consultants.

6. Standard of Care. Consultant shall exercise the same degree of care, skill, and diligence in the performance of the Agreement as would be exercised by a reasonable professional performing similar work under similar circumstances, and shall, at no cost to District, re-perform services which fail to satisfy this standard of care. All work of an engineering nature shall bear the stamp and signature of an engineer registered in the State of California.

7. Indemnification. If an action is filed in which it is claimed or alleged that any damages, injuries, or deaths arose out of, pertained to, or related to negligent acts, errors or omissions, recklessness, or willful misconduct of Consultant (or any person or organization for whom Consultant is legally liable), in the performance of the services for District, Consultant agrees, at its own expense, to defend District, its Governing Bodies, Directors, officers, employees and agents; provided that no settlement of a claim shall be made without the consent of District.

To the extent permitted by law, Consultant shall indemnify, save and hold harmless District, its Governing Bodies, Directors, officers, employees and agents from and against all claims, demands, costs and expenses, including reasonable attorney's fees, and liability for any damages, injuries or deaths arising out of, pertaining to, or relating to the negligent acts, errors or omissions, recklessness, or the willful misconduct of Consultant (or any person or organization for whom Consultant is legally liable), directly or indirectly related to the services provided

hereunder excepting therefrom only those claims, demands, or liability caused by the sole or active negligence, or the willful misconduct of the District. Consultant will reimburse District for any expenditure or fees District may make by reason of such matters.

To the extent permitted by law, Consultant shall also indemnify the District, its Governing Bodies, Directors, officers, employees and agent, against any and all claims, demands, costs and expenses at law or in equity including reasonable attorneys' fees, and liability, suffered or incurred on account of, or that may at any time arise out of, or are in any way connected with, any breach by Consultant, or its employees, agents, subconsultants, or subcontractors, of the obligations, covenants, or any other provisions of this Agreement.

This Section shall survive any expiration or termination of this Agreement.

8. Confidentiality. Consultant shall treat any information it may come to have relating to the Agreement with confidence, revealing information to third parties only with prior written approval of District.

9. Assignment. The Agreement shall not be assignable or transferable in whole or in part by Consultant, whether voluntarily or by operation of law provided, however, that Consultant with the prior written consent of District may subcontract that portion of the services for which Consultant does not have the facilities to perform. Any other purported assignment, transfer or subcontracting shall be void. Nothing in the Agreement shall be construed to give any right or benefit to anyone other than District and Consultant.

10. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of California.

11. Captions and Headings. Captions and headings in the Agreement are solely for convenience in locating certain provisions and shall not be construed as limiting, expanding, or otherwise affecting the provisions of this Agreement.

**Cost Evaluation Form
SharePoint Implementation and Training Services**

Item	Task	Description	Level of Effort (Hours)	Average rate, \$/Hour	Cost, \$
1	Design and Create User Portal	Develop a "front end" user portal that emulates visual aspects of current employee website (see attachment)			
2	Migrate District File Share	Migration should include converting foldered organization to metadata. There will be a number of directories that should be turned into team sites			
3	Create "Team Site" Template	A template is needed to easily build team sites to replace collaborative directories as needed.			
4	Implement Workflows	Two workflows that were created during proof-of-concept project will need to be implemented into new SharePoint Environment			
5	Build Information Systems Department Site				
6	Training Program Design	Design training program			
7	Training Program	Onsite training of end users – Using SharePoint as implemented in Phase 1			
8	Option to Extend	Phase 2: Four additional department sites with file share migrations; One additional workflow implemented			

The District will evaluate and compare the level of effort provided by all firms. The District will include this evaluation/comparison to score a firms demonstrated understanding of scope of work and reasonableness under-scoring Section B "Approach to Work."

**CCWD EMPLOYEE
ONLINE RESOURCE**

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[Web Mail](#) | [Staff Directory](#) | [Submit a Suggestion](#) | [Classifieds](#)

2018: 23 hours, 44 minutes and 27 seconds without a lost-time incident.
2017: 21 hours, 43 minutes and 27 seconds without a lost-time incident.

Employee News
Find out what's happening at your place of work

**This Day in
VD History**

1888 Vegetarian
breaks ground for
the first restaurant
in the Bay Area.
1912 Found Coach
at the site of the
first automobile
race.



**1st Vegetarian is Growing by Way
Nifty**
2018 January 1st marked the opening of
the first vegetarian restaurant in the
San Francisco Bay Area.



They're Excavating!
2018 The excavator is back at work
digging up the site of the first
excavation in the Bay Area.



**CCWD Recognizes 100th Anniversary
of the Fire Department**
2018 The Fire Department is celebrating
100 years of service to the community.



**High Standard for
Safety Award in Feb**
2018 The Safety Award is presented
to the employee who has demonstrated
exceptional safety performance.

In the News

**San Francisco Water Utility Should Support Twin
Tunnels**
2018 The City of San Francisco should support the
California Water State's plan to build a twin tunnel
system to deliver water to San Francisco. The
City should also support the State's plan to build
the San Francisco Water Utility's twin tunnel
system.

**CCWD Staff Repairs Mountain Water Main
Break**
2018 CCWD Staff Repaired Mountain Water Main
Break. The staff worked for several days to repair
the break in the mountain water main.

**Water District Seeking Applications for Seat on
Board of Directors**
2018 The Water District is seeking applications
for a seat on the Board of Directors.

Calendar of Events

FEBRUARY 2018						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

Week February 13
CCWD Board of Directors Meeting. CCWD Board of
Directors will meet on February 13, 2018 at 10:00 AM
at the CCWD Boardroom. The meeting will be held
at the CCWD Boardroom. The meeting will be held
at the CCWD Boardroom.

14, February 14
Chinese New Year. Chinese New Year is a
major holiday in China and other parts of
Asia.

14, February 15
Employee Appreciation. Employee Appreciation
Event. One of our employees will be
recognized for their hard work.

14, February 16
Employee Appreciation. Employee Appreciation
Event. One of our employees will be
recognized for their hard work.



New 2018-19 Employee Safe Practices Manual
The new 2018-19 Employee Safe Practices Manual
has been published. The manual contains
information on safety procedures and
policies.