RESOLUTION NO. 15-09-89

A RESOLUTION OF THE VILLAGE COUNCIL OF
ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA,
APPROVING SELECTION FOR INFORMATION
TECHNOLOGY (IT) CONSULTING AND SUPPORT
SERVICES; AUTHORIZING THE VILLAGE ATTORNEY
TO DEVELOP A PROFESSIONAL SERVICES
AGREEMENT; AND PROVIDING FOR AN EFFECTIVE
DATE

WHEREAS, Islamorada, Village of Islands (the “Village”) prepared and advertised a
Request for Proposals for Information Technology (IT) Consulting and Support Services, (RFP-
15-06) (the “RFP”), a copy of which is attached as Exhibit “A”; and

WHEREAS, the Village Manager created an RFP Review Committee (the “Committee”)
to review the proposals and make recommendations to the Village Council for selection of
responsive proposals; and

WHEREAS, the Committee reviewed the seven (7) proposals received utilizing the
evaluation and scoring criteria set forth in the RFP and

WHEREAS, the two (2) highest scoring firms appeared before the Committee to expand
upon their proposals and clarify their proposed scopes of work; and

WHEREAS, after meeting with the two (2) highest scoring firms, United Data
Technologies was unanimously selected by the Committee for recommendation to the Village
Council; and

WHEREAS, the Village Council finds that approval of United Data Technologies to
provide consulting and support services to the Village’s IT and Communications Department is
in the best interest of the Village.

NOW, THEREFORE, BE IT RESOLVED BY THE VILLAGE COUNCIL OF
ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA, AS FOLLOWS:
Section 1. Recitals. The above recitals are true and correct and incorporated into this Resolution by this reference.

Section 2. Approval of Ranking. The Village Council of Islamorada, Village of Islands, hereby approves the rankings of the RFP Review Committee as set forth in the attached Exhibit “B”, and approves the selection of United Data Technology to perform the services outlined in RFP-15-06, attached hereto as Exhibit “A”.

Section 3. Authorization to Develop an Agreement The Village Council hereby authorizes the Village Attorney to develop a Professional Services Agreement between the Village and United Data Technologies for consulting and supporting services to the Village’s IT and Communications Department as described in the Proposal attached hereto as Exhibit “C”.

Section 4. Effective Date. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED ON THIS 10\textsuperscript{TH} DAY OF SEPTEMBER, 2015.

Motion to adopt by Councilman Chris Sante; second by Vice Mayor Deb Gillis.

FINAL VOTE AT ADOPTION

VILLAGE COUNCIL OF ISLAMORADA, VILLAGE OF ISLANDS

Mayor Mike Forster YES
Vice Mayor Deb Gillis YES
Councilman Jim Mooney YES
Councilman Chris Sante YES
Councilman Dennis Ward YES
ATTEST:

MIKE FORSTER, MAYOR

KELLY TOTH, VILLAGE CLERK

APPROVED AS TO FORM AND LEGALITY
FOR THE USE AND BENEFIT OF ISLAMORADA,
VILLAGE OF ISLANDS ONLY

ROGET V. BRYAN, VILLAGE ATTORNEY
Islamorada, Village of Islands, Florida

REQUEST FOR PROPOSALS
INFORMATION TECHNOLOGY (IT) CONSULTING AND SUPPORT SERVICES
(RFP-15-06)

Issue Date: April 13, 2015

Islamorada, Village of Islands, will receive formal Proposals for Information Technology (IT) Consulting and Support Services, per specifications and scope of services established from time to time, until 3:00 p.m. on May 1, 2015.

Interested firms must submit sealed Proposal packages by certified mail or in person to:

Islamorada, Village of Islands
Attn: Village Clerk
86800 Overseas Highway
Islamorada, Florida 33036

It is the sole responsibility of the firm to ensure that their submittal is received in a timely manner. Any Proposal package submitted past the deadline and/or submitted to other locations or offices shall be deemed non-responsive and will be rejected.

I. PURPOSE

The purpose of this Request for Proposals (RFP) is to solicit sealed proposals to establish term contract(s) with one or more qualified contractor(s) for outsourcing Information Technology (IT) functions performed by the Village’s IT and Communications Department.

II. OBJECTIVES

The primary objective is to enter into a contract for the delivery of the required services at an agreed cost and level of service and performance. The selected firm(s) may provide support in one, some or all of the IT functional areas identified in the Scope of Work section of this RFP document.
A secondary objective of this RFP is to retain a firm to eventually work with a to-be-established Steering Committee to create a well-documented strategic plan to guide the IT and Communications Department over the next five years in planning, procuring, implementing and managing current and future technology investments and resources.

The strategic plan should involve a thorough analysis of the following areas:

a. Existing infrastructure, staffing, funding applications, business systems, projects, processes and other investments and resources currently in use by the Village.

b. Identification, prioritization and cost analysis of projects that the IT and Communications Department should undertake over the next five years.

c. Practical and relevant private and public sector industry standards.

d. Identification of needs to accommodate current and future technology requirements such as data storage and management, legal requirements and security requirements.

III. BACKGROUND AND HISTORY

Islamorada, Village of Islands (the “Village”) is a municipality located in the Florida Keys and is comprised of four islands spanning 18 miles. The population is approximately 6,100, and the Village has almost 100 full-time employees. As a Florida municipality, the Village must operate within the guidelines of Florida Statutes relating to public records, public meeting and Sunshine laws. The Village undergoes an annual financial audit pursuant to Florida Statutes. IT network and data security considerations are periodically included in the scope of the annual audit. Additionally, the Village must follow the guidelines of its purchasing ordinance when purchasing capital, supplies and services.

Facilities: The Village has one three-story Administration and Public Safety Building (Village Hall), three Fire Rescue Stations (one of which serves as the Emergency Operations Center), one Parks and Recreation Building, one Public Works area, one Marina office, and one Community Center that also serves as a Council Chambers from which Village Council meetings are broadcast.

Departments and Staff: The Village employs approximately 100 full-time employees and approximately 20 seasonal / part-time employees in the following departments: Village Manager, Village Attorney, Village Clerk, Finance and Administration, IT and Communications, Building Services, Planning and Development Services, Code Enforcement, Fire Rescue, Local Law Enforcement, Public Works and Transportation Maintenance, Parks & Recreation, PYH Marina and Wastewater Utility.

IT and Communications Department Functions: The Village’s IT and Communications Department manages and secures Village servers and computer systems, data imaging and recovery systems, Village e-mail, communications and broadcast systems and network infrastructure. The Department ensures that daily, weekly and monthly backup images (stored both on and off-site) for all Village domain servers along with monthly backup images of Village workstations for disaster recovery are performed. The IT and Communications Department also maintains Village servers, computers, printers and network ancillary equipment, manages all phone systems, ensures accurate and timely web site postings from all Village departments and safeguards Village data across all...
components. Additionally, the Department is responsible for recording, archiving and broadcasting Village Council and Local Planning Agency Meetings.

**IT and Communications Department Staff:** The following positions have recently comprised staffing of the Village’s IT and Communications Department: one Director, one IT Program Manager (Systems Engineer) and one IT and Communications Assistant. The IT Program Manager position is currently vacant. The Village has not historically had staff that provides assistance with more complex software system applications. Therefore, in the fiscal year 2014-2015 budget, the Village Council approved a new Software Applications Specialist position for the Department. This position has not yet been filled.

**IV. SCOPE OF SERVICES**

Due to the difficulty the Village has experienced in filling the IT and Communications Department full-time staff positions and in retaining staff once hired, the Village Manager would like to investigate engaging a firm to augment and support the IT Director in performance of the IT Director’s duties.

The selected firm would first need to perform an objective review and analysis of the Village’s current IT network, systems, software programs and processes to assist the IT and Communications Director and the Village Manager in determining how to best meet administrative and technology needs on an ongoing basis. This step of the engagement would ensure IT efficiency is maximized as affordably as possible and that best practices are implemented. This analysis is also needed in order to support future staff requests made to the Village Council for IT-related expenditures. Assessment of risk related to IT infrastructure failure and loss of data would also be required.

Ongoing technology needs include the following service areas:

- **E-Mail Messaging:** Provide services and activities to support the Village’s e-mail and other interpersonal communications computing infrastructure, and for archiving for public records request response purposes.

- **Desktop Computing:** Support for desktop computing hardware devices and associated operating system software, laptop and notebook computing, local and network printers, scanners, copiers, hand-held computing devices. The Village currently participates in a lease program with Dell Financial Services for systematic replacement and upgrade of desktop computers in four-year cycles.

- **Help Desk:** Prioritize and respond to service requests from Village staff, responding after normal business hours as situationally required.

- **Server Maintenance and Backups:** Provide preventive, diagnostic and remedial support to maintain the Village’s servers, including performance of daily, weekly and monthly backups. Future considerations include virtualization and consolidation solutions.
• **Data Network:** services and activities required to provide and support the Village’s computer network environment, including LAN, wireless distribution systems, network security, VOIP and internet domain name management.

• **Voice and Video Telecom:** Record, archive and broadcast bi-monthly Village Council meetings, occasional workshops and monthly Local Planning Agency meetings.

• **Business Continuity and Disaster Recovery:** Facilitate, guide and collaborate with Village staff in conducting impact analyses on the Village’s technology infrastructure and ability to provide services in the event of a natural or other disaster. Future creation and development of a continuity plan and/or disaster recovery plan.

• **Software Application Support:** Patch installation, testing and monitoring; security patches; upgrades; troubleshooting. Internal software development is limited to utilizing the customizable features of the applications and any specified custom reporting. Responsibility for meeting these needs normally falls on the staff that primarily utilizes the software applications in daily operations. Long-term and future needs include implementation of software changes and upgrades, and augmentation of staff efforts to reconfigure software as needed. In 2015 the Village will be implementing a new fund management software system for its finance and accounting activities that will likely require guidance and oversight. Assistance in this regard and with future GIS updating and mapping would be required.

• **Web and Internet:** Enhancement of the Village’s website and expanded use of social media to promote transparency and public communication, as identified by the Village Council as priorities beginning in fiscal year 2014-2015. The Village’s website is currently externally hosted. The Village would like to enable staff in other departments of the Village to make changes, delete and add content to web pages as needed without affecting core web site formatting and functionality.

• **Security System:** The IT and Communications Department is responsible for maintaining the security systems for the Administration and Public Safety Building and the three (3) Fire Rescue Stations, which includes access badge issuance.

In order to fulfill the needs described above and meet the requirements for quick response and specialized services, the Village may retain more than one (1) qualified firm to perform the services described in the RFP, in whichever manner the village deems most responsive to the Village’s needs. No minimum quantity of work or compensation for the work will be assured to the firm(s) retained and the Village shall not be prevented in any manner from retaining other firms at its sole discretion.

The Village reserves the right to accept or reject any or all Proposals; to waive irregularities, technical errors and formalities; and to select a qualified firm(s) to provide the Services as it deems will best serve the interest of the Village.
V. ELIGIBILITY CRITERIA

To be eligible for selection consideration, interested consultants/firms must submit one (1) original printed package, five (5) printed copies, and one (1) electronic copy on CD. The CD copy should be exactly identical to the original printed package, in natively converted PDF format and should be labeled “Proposal for Information Technology (IT) Consulting and Support Services (RFP-15-06).”

Proposal packages must contain the following information:

1. **Cover Letter:** Provide a cover letter introducing your firm and proposal.

2. **Company Overview:** Provide an overview of the company detailing the total number and expertise of professional staff, describing staff credentials, and identifying office locations and staff assigned to those offices throughout the Florida Keys or the nearest locations to the Florida Keys. Please note that the Village prefers to contract directly with prime entities and the use of sub-consultants in your submission may affect proposal scoring.

3. **Project Management Experience / Project Examples:** Provide at least three examples of successfully implemented application development projects that demonstrate experience with integrated project delivery, change management, vendor management, software development and configuration and business process analysis preferably in a local government setting. Include the client name, project name, project location and summary of services performed.

4. **Project Approach:** Present your understanding of the Village’s needs as a Florida municipality and the scope of services required. Describe how your firm would approach each of the following:
   
   A. Review and analysis of the Village’s current IT network, systems, staffing, and software programs and process; and
   
   B. Management of each of the ongoing technology needs outlined in Section IV. Scope of Services.

5. **Project Timeline and Fee Schedule:** Provide unit (per hour) or total annual fees for the service areas identified in the Scope of Services section of this RFP and for facilitating strategic planning. Provide a suggested timeline within which each of the needs described above would be addressed, and identify deliverables as appropriate.

6. **State Authorization to Transact Business:** Provide proof of authorization to transact business in the State from the Florida Secretary of State.

7. **Statement of Preference for Local Business:** Any business seeking certification as a local business shall provide an executed affidavit, in the Firm’s own form, certifying that it meets the criteria established in Village Code Section 2-327(e) for a determination as a local business. A complete copy of the Village’s Code of Ordinances can be accessed online by clicking on the ‘Municode.corri’ Quick Link on the Village’s website at http://www.islamorada.fl.us/.
All inquiries and requests for clarification or interpretation regarding this Request for Proposals shall be made in writing to the attention of the Procurement and Grants Administrator by mail to 86800 Overseas Highway, Islamorada, Florida 33036; by email to ana.hernandez@islamorada.fl.us; or by fax to (305) 664-6464 no later than April 24, 2015.

An optional on-site visit or walk-through of the Village’s facilities and IT infrastructure and software applications may be scheduled no later than five (5) calendar days prior to the Proposal submission deadline. To schedule an on-site visit, please contact the Procurement and Grants Administrator by telephone at (305) 664-6453, or by email to ana.hernandez@islamorada.fl.us.

The Village shall issue appropriate addenda as necessary via DemandStar at https://www.demandstar.com/ and on the Village’s website at http://www.islamorada.fl.us/. No oral change or interpretation of the provisions contained in this Request for Proposals is valid. Written addenda shall be issued when changes, clarifications or amendments to the Request for Letters of Interest and Qualifications document are deemed necessary. The issuance of a written addendum is the only official method whereby interpretation, clarification or additional information can be given.
This addendum forms a part of the Request for Proposals (RFP) and clarifies the original Request for Request for Proposals as noted.

* * *

I. The following answer is provided in response to written questions presented to the Village Manager by potential proposers:

**Submittal**

**Question:** Do I have to sign up as a Planholder to bid?

**Answer:** No. Proposers are not required to sign up as a Planholder in DemandStar to respond to this RFP.

**Question:** Can I just submit my paperwork to the City as stated in the RFP? Or do I have to use DemandStar?

**Answer:** In accordance with the RFP, sealed Proposal packages must be submitted by either certified mail or in person to the Village Clerk no later than 3:00 pm on May 1, 2015.

* * *

REMAINDER OF PAGE INTENTIONALLY LEFT BLANK
This addendum forms a part of the Request for Proposals (RFP) and clarifies the original Request for Request for Proposals as noted.

I. The RFP is hereby revised as follows (strike-thru indicates items deleted or replaced and underline indicates items added or revised):

Islamorada, Village of Islands, will receive formal Proposals for Information Technology (IT) Consulting and Support Services, per specifications and scope of services established from time to time, until 3:00 p.m. on May 1, 2015. Proposal packages will be opened by the Village Clerk at 3:15 p.m. EST on May 15, 2015.

All inquiries and requests for clarification or interpretation regarding this Request for Proposals shall be made in writing to the attention of the Procurement and Grants Administrator by mail to 86800 Overseas Highway, Islamorada, Florida 33036; by email to ana.hernandez@islamorada.fl.us; or by fax to (305) 664-6464 no later than April 24, 2015.
This addendum forms a part of the Request for Proposals (RFP) and clarifies the original Request for Proposals as noted.

* * *

I. The following answer is provided in response to written questions presented to the Village Procurement and Grants Administrator by potential proposers:

**Contract Proposal**

**Question:** Do you feel that multiple options in the proposal would be good? We are thinking to provide one overall contract proposal but were also thinking to provide something that is strictly hourly. Do you think it best just to provide one option instead of two?

**Answer:** An overall contract cost proposal along with an hourly rate schedule would be the best approach.

**Question:** Is it possible for an extension of the RFP Deadline for One (1) week from May 1<sup>st</sup>, 2015 to May 8<sup>th</sup>, 2015?

**Answer:** The deadline to submit the proposals has been extended to May 15, 2015. See Addendum 2.

**Question:** Could you delineate the weight ratings for each of the IT vendor selection criteria with respect to the proposal scoring?

**Answer:**

Scoring suggested by Village Manager; to be revised and agreed to by Selection Committee prior to review of proposals received:

- Cover Letter 10 points
- Company Overview 20 points
- Experience 20 points
- Project Approach 15 points
- Timeline & Fees 15 points
- State Authorization 10 points
- Local Business 10 points
- TOTAL 100 points

**ISSUE DATE: May 1, 2015**
**Question:** The RFP states the following:

Project Management Experience / Project Examples

Provide at least three examples of successfully implemented application development projects that demonstrate experience with integrated project delivery, change management, vendor management, software development and configuration and business process analysis preferably in a local government setting. Include the client name, project name, project location and summary of services performed.

The above mentions application Development projects. Is this asking us to provide 3 projects where we developed (coded) the application or is this asking for 3 projects we implemented and managed.

**Answer:** Three projects that the firm implemented and managed. Assistance with configuration and implementation of out of the box software may be requested, but development of original software programs and applications customized for the Village and resulting from writing computer code would not be requested.

**Technical Information**

**Question:** What are the current applications that you are using for Software Application Support?

**Answer**

| Village-wide | Microsoft Office Applications 2007-2013  
|             | OnBase Document Management System  
| Building, Planning  
| & Code Enforcement | CityView 2014  
| Building & Planning | ARC GIS  
| Fire Rescue | Firehouse  
|             | Station Automation  
| Finance | Current software: New England Municipal Resource Center, Inc. (NEMRC); General Ledger, Accounts Payable, Cash Receipts, Fixed Assets, Payroll  
|             | Negotiating contract with Tyler Technologies to implement Incode Financial Management, Personnel Management, Customer Relationship Management and Content/Document Management Suites  

**Question:** What is your current implemented hardware?

**Answer:** Dell servers/workstations/notebooks – 7 locations  
Canon production copiers/scanners – 4 locations
The firm retained will not have a guaranteed minimum amount of work nor minimum amount of compensation. The contract between the Village and the Consultant is non-exclusive and the Village may retain other firms for the same work.

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Question: What links are between your buildings?
Answer: Ubiquiti Wi-Fi Networks in Founders Park

Question: What processes do you have in place today?
Answer: Dell OpenManage for servers
LabTech 2013 for all network devices

Question: What is your current backup plan and Retention period?
Answer: ShadowProtect server/workstation imaging per evening, week, monthly off-site, yearly off-site.

Question: Can you provide more information on your Security System and the maintenance required for it?
Answer: GE Topaz security

Contract Award

Question: Can you please clarify this line on page 4 of the RFP? “No minimum quantity of work or compensation for the work will be assured to the firm(s) retained and the Village shall not be prevented in any manner from retaining other firms at its sole discretion.”

Answer: The firm retained will not have a guaranteed minimum amount of work nor minimum amount of compensation. The contract between the Village and the Consultant is non-exclusive and the Village may retain other firms for the same work.

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This addendum forms a part of the Request for Proposals (RFP) and clarifies the original Request for Proposals as noted.

* * *

I. The following answer is provided in response to written questions presented to the Village Procurement and Grants Administrator by potential proposers:

**Project Requirements**

**Question:** Does the Village desire that the selected consultant give and/or facilitate presentations during the project? If so, at what milestones and to what audiences?

**Answer:** At this time, we do not anticipate that any presentations will be needed during the project. The strategic plan will be a staff-based effort for use mainly for budget purposes. Any information or conclusions resulting from the process will be presented to the Village Council by staff.

**Question:** Does the Village desire regular status updates/reports for the duration of the project? If so, at what frequency (e.g., bi-weekly, monthly)?

**Answer:** We do not anticipate that regular status updates or reports will be needed. Status updates will occur through interaction with a steering committee comprised of staff.

**Question:** Does the Village anticipate the selected consultant will need to meet with the various departments that receive IT support services? If so, with how many departments and at what organizational level (e.g., Village leadership, management, end users) does the Village expect the consultant to conduct these meetings?

**Answer:** The strategic plan will be developed by working with a steering committee comprised of staff-mainly department directors and/or managers. In meeting with the steering committee, the consultant would facilitate the process to develop a strategic plan.
**Question:** Does the Village envision that meetings with department staff will be conducted at a central location or at multiple locations throughout the Village?

**Answer:** For the strategic planning process, meeting would be conducted with the steering committee at a centralized location.

**Question:** Has the Village developed an IT Strategic Plan in the past, either internally or with the assistance of a consultant? If so, can it be shared?

**Answer:** The Village has not developed an IT strategic plan previously. We are doing so mainly in response to financial audit management letter comments.

*Technical Information*

**Question:** Would the Village provide a list of the existing core set of IT policies and procedures currently in place?

**Answer:** We do not have formalized IT policies and procedures to provide at this time.

*Proposals*

**Question:** Does the Village have a preference for contracting a local firm for this work? If so, what weight will this have in the evaluation process?

**Answer:** As stated in the RFP, the Village will consider and apply local preference. Out of 100 points currently proposed for evaluation of proposals (please see Addendum #3), 10 are proposed for providing local preference documentation.

**Question:** Given that “selected firm(s) may provide support in one, some or all of the IT functional areas identified,” may an offeror submit a proposal to perform only the 5-year IT strategic planning and/or business continuity planning portions of the Scope of Services?

**Answer:** Yes.

*Contract Award*

**Question:** Has the Village identified a budget for the requested services, and if so, can it be shared?

**Answer:** The Village has not yet identified a budget.

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Proposal prepared for Islamorada, Village of Islands RFP-15-06
Information Technology (IT) Consulting and Support Services
Prepared By:
United Data Technologies

Due May 15th, 2015 @ 3:00PM
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Cover Letter

Islamorada, Village of Islands
Attention: Ms. Ana Hernandez, Village Clerk
86800 Overseas Highway
Islamorada, Florida 33036

Dear Ms. Hernandez:

United Data Technologies (UDT) is pleased to offer Islamorada, Village of Islands, Florida a proposal in response to: RFP: #15-06: Information Technology (IT) Consulting and Support Services.

UDT is a Florida-based, 100% minority owned company, with proven expertise in managed services, deployment and support of comprehensive technology solutions in Local/State Government, K-12 and Higher Education. UDT is the industry leading solutions provider in the Southeast that is focused on public sector technology needs. Founded in 1995, our organization subscribes to a Total Solutions approach that includes consulting, design, engineering, product procurement, systems integration and support services.

UDT takes the guesswork out of the process; creating customized integration plans and building detailed, long-term strategies that sustainably align with our client’s business objectives. Headquartered in Miami, Fl, UDT is recognized across the country as a leading integrator for Information Technology. UDT is a leader in the IT community, leading advisory boards for Intel, HP, Cisco and other innovating organizations. Specializing in the public sector market, approximately 75 percent of UDT’s revenue is generated from public sector in Florida. UDT currently provides products and services to the five largest school districts in Florida, as well as to over half the districts in the state.

UDT’s comprehensive, customer-centered approach to Islamorada delivers a single source for planning, procurement and support. UDT’s approach with local government is to help transform operations and infrastructure by improving city functions with innovative solutions. For example, UDT can leverage the power of cloud computing to reduce costs and increase efficiencies, empowering employees with enterprise grade devices and applications, and enabling innovation on your terms with a modern solution and big data platform. Current local city governments for which UDT has provided services in the South Florida area are the City of Fort Lauderdale, North Lauderdale, Lauderhill, Hollywood, West Palm Beach, Miami, Doral, Sunrise, Tamarac and more.

The persons authorized to make representations on behalf of United Data Technologies related to this Response are as follows:

Justin Clary, Account Manager
Phone: 305-496-5061 Email: Justin.clary@udtonline.com

Bryan Levy, MSP Manager
Phone: 786-364-5916 Email: Bryan.levy@udtonline.com

Hugo Perez, Director of Managed Services
Phone: 305-490-8828 Email: Hugo.perez@udtonline.com

Our proposal provides a very seasoned, local, dedicated team to partner with Islamorada, Village of Islands. We look forward to providing formal presentations of our capabilities and beginning our long-lasting partnership.

Sincerely,
Justin Clary
Section 1 - Company Overview

Company Overview: Provide an overview of the company detailing the total number and expertise of professional staff, describing staff credentials, and identifying office locations and staff assigned to those offices throughout the Florida Keys or the nearest locations to the Florida Keys. Please note that the Village prefers to contract directly with prime entities and the use of sub-consultants in your submission may affect proposal scoring.

UDT Response:

UDT will be the Prime vendor responsible and, if required, will subcontract for specific duties as listed below as necessary. Although we may have subcontractors of UDT, UDT is the prime and will manage any process from start to finish. UDT is located in Doral, Florida.

UDT’s Managed IT as Service, at its core, is comprised of Remote Monitoring & Management (RMM) which is designed to provide our customers with a comprehensive suite of remote infrastructure and desktop managed services. Our services are performed 24x7, 365 days a year by experienced, certified technicians, who use enterprise-class technologies and follow proven ITIL processes to ensure 24x7 uptime for servers, network devices, and infrastructure & business applications.

MANAGED IT as a Service provides fully-managed services for the client infrastructure and is focused on troubleshooting, remediation, problem reporting, coordination with 3rd party vendor tech support and reporting via a secure IT operations platform (ITOP). UDT personnel reviews incoming alerts and log files to quickly pinpoint an issue and remediate the problem. If the UDT personnel are unable to resolve the problem, the ticket will be updated with detailed troubleshooting steps and immediately escalated to the 3rd party vendor’s tech support or ISP vendor for further troubleshooting and full resolution, onsite dispatch is included at UDT’s discretion. All hardware under the MANAGED + service requires an active vendor support contract, and all software be genuine, licensed, and vendor supported.

UDT’s Managed IT as a Service is composed of our proven methodology which consist of Five Service Delivery Areas:

UDT'S MSP 5 SERVICE DELIVERY AREAS

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<th>Service Desk</th>
<th>Systems Administration</th>
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<td>• Change and Configuration Management</td>
<td>• Security Administration</td>
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UDT’s Managed IT as a Service is composed of our proven methodology which consist of Five Service Delivery Areas:

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Company Overview: Provide an overview of the company detailing the total number and expertise of professional staff, describing staff credentials, and identifying office locations and staff assigned to those offices throughout the Florida Keys or the nearest locations to the Florida Keys. Please note that the Village prefers to contract directly with prime entities and the use of sub-consultants in your submission may affect proposal scoring.

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The Service Desk is the single point of contact for all incident, problem management and request fulfillment. Our ITIL certified staff and highly skilled technicians will make sure that your issues are addressed promptly. Our cost-efficient solution enables support personnel to access The Village’s systems, providing instant support, as if we were there in person. UDT Service Desk is provided during normal business hours: Monday through Friday, from 7am to 7pm.

**Highlights:**
- The Service Desk will support any system running Microsoft or Macintosh operating systems.
- The Service Desk will open a ticket with third-party vendors of business line application(s) and ISP connectivity when applicable.
- Service Desk includes traditional “Help Desk” services for desktop support under contract.
- Software and hardware not covered by a current maintenance agreement by the respective manufacturers will be addressed on a “best effort” basis.
- The Service Desk reserves the right to make changes to the list of supported products without notice.

Our Service Desk offering gives a UDT client end-user/end-point remote support based on the philosophy that predictable, repeatable workflow processes will lead to a distinct improvement in customer experience levels.
**Centralized Services**

Centralized Services are the proactive 24x7x365 remote monitoring, protecting your network with anti-virus, patch and backup management. Our remote monitoring tools are fine-tuned to your company’s unique environment to alert UDT’s world-class Network Operation Center (NOC) for immediate notification and remediation.

**Level 1 support** begins with information gathering, as well as, basic troubleshooting/triage. UDT will make a thorough attempt to resolve the issue, using its knowledge base, experience and readily available industry-standard tools and resources.

**Level 2 support** can be generally defined as an escalation of a service call from the Level 1 for more advanced troubleshooting and diagnostics, initiation of remote control (if the client has broadband internet access and authorizes remote remediation), and/or shut-down and reboot/restart procedures, and, possibly, product enhancements.

**Level 3 support** typically involves on-site advanced troubleshooting and diagnostics, and/or shut-down and reboot/restart procedures, and, possibly, hardware/software manufacturer support involvement.
ITOP is UDT's main Remote Monitoring and Management (RMM) platform. ITOP is a unified operations platform built by IT ops engineers for IT ops engineers. ITOP leverages nine years of service delivery experience to provide UDT a comprehensive SaaS platform that unifies our IT operations from closet to cloud. Its feature-set spans from discovery through provisioning, monitoring, management, ticketing, SLA management, reporting and compliance. The ITOP "single pane of glass" view makes UDT agile and responsive to the fast changing IT needs of our customers, while ensuring high-availability, continuity and security of their environment.

**Systems Administration**
System Administration delivers services like Cooperative IT (or CO-IT), which are dedicated, reoccurring and scheduled on-site or remote technical resources. Within Systems Administration, we execute standardization though best practices, working diligently to eliminate reactive issues while reducing risk.

**Virtual Client Advisor**
The Virtual Client Advisor consists of dedicated personnel with the right balance of management and technical experience. The virtual client advisor will help you with your technology planning and budgeting. In addition, the virtual client advisor will sit down with you, regularly, and perform detailed business reviews to make sure that your IT department is aligned strategically with your business goals.

**Professional Services**
Professional Services is the expert escalations tier. In addition, professional services is responsible for projects that require architectural changes or implementation of new technologies. Our professional services staff consist of over 50 best-of-breed engineers, holding top certifications, such as Cisco Certified Internetwork Expert (CCIE), Microsoft Certified Solution Expert (MCSE) and Citrix Certified Experts (CCE) certifications. Professional services are here to help you implement, even the most sophisticated solutions.

**Cloud Services (Optional)**
UDT Engineers can help you extend the value of your technology investment. Our consultative approach is designed to help you find a cloud technology solution that fits your IT needs. UDT understands that every organization has unique needs and requirements. Some clients will benefit more from adopting a hybrid approach, while others needs are more suited for on premise solutions. UDT's approach is based on application and business needs in order to minimize Capital Expenses and IT resource investment.

**Client Responsibilities**

Upon execution of the Managed IT as a Service agreement, UDT may need to assess The Village's application and network infrastructure to determine the health of the
current infrastructure. Should we determine that it requires a refresh/upgrade, UDT will present a quote(s) for the work to bring items under a manufacturer-approved maintenance/warranty support.

UDT will assign a project lead to ensure successful implementation of Managed IT as a Service. The project lead will provide all communications and status updates, learn key Village employees and their roles, and identify unique needs for incorporation into The Village’s operational run book. The project lead will also define scope/schedule of the onboarding process, coordinate engineering resources where necessary, and verify that all milestones are met.

The Village’s will designate an executive sponsor with responsibility and authority to review and approve deliverables under this proposal.

- The Village’s will provide licenses for ALL systems under the signed Managed IT as a Service agreement. The Village’s will also be responsible for upgrades to later versions.
- The Village’s will provide an adequate communications link between its enterprise and UDT’s NOC, including all associated provisioning, transport and equipment fees.
Service Level Agreement (SLA)

Prioritization

Prioritization is a function of Urgency and Impact. In order to address customer service incidences in a timely manner, UDT defines prioritization as a function of Urgency and Impact:

\[
\text{Priority} = \text{Urgency} + \text{Impact}
\]

Urgency is a measure of how quickly a resolution of the incident is required. Urgency is classified by High (H), Medium (M) and Low (L) based on the following Urgency Matrix (which is customizable to the customer’s unique business scenario):

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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</thead>
</table>
| High (H) | The damage caused by the incident increases rapidly  
Work that cannot be completed by staff is highly time sensitive  
A minor Incident can be prevented from becoming a major Incident by acting immediately  
Several users with VIP status are affected |
| Medium (M) | The damage caused by the incident increases considerably over time  
A single user with VIP status is affected |
| Low (L) | The damage caused by the incident only marginally increases over time  
Work that cannot be completed by staff is not time sensitive |

Impact is the measure of extent the Incident and the potential damage caused by the Incident before it can be resolved. Impact is classified by High (H), Medium (M) and Low (L) based on the following Impact Matrix (which is customizable to the customer’s unique business scenario):

<table>
<thead>
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</table>
| High (H)  | A large number of staff are affected and/or not able to do their job  
A large number of customers are affected and/or acutely disadvantaged in some way  
The financial impact of the Incident is (for example) likely to exceed $10,000 |
| Medium (M) | A moderate number of staff are affected and/or inconvenienceed in some way  
A moderate number of customers are affected and/or inconvenienceed in some way  
The financial impact of the Incident is likely to exceed $1,000 but will not be more than $10,000 |
| Low (L)   | A minimal number of staff are affected and/or able to deliver an acceptable service but this requires extra effort  
A minimal number of staff are affected and/or inconvenienceed but not in a significant way  
The financial impact of the Incident is (for example) likely to be less than $1,000 |

In accordance to the Priority Calculation Table below priority is measured from P1 (Critical) to P5 (Planning) using Urgency & Impact:
Example – If a user calls the service desk to report an incident that has an urgency of “Medium” and an impact of “High”, then in accordance to the Priority Calculation Table, that incident will receive a prioritization level of “2” and follow the Service Level Agreement for a Priority 2.

SLA- Operational Business Hours: 7AM- 7PM, Monday-Friday

Service Level Matrix

<table>
<thead>
<tr>
<th>Priority</th>
<th>Classification</th>
<th>Response*</th>
<th>Resolution Plan*</th>
<th>Resolve By*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Emergency</td>
<td>.5hr (30 min)</td>
<td>1hr</td>
<td>1d</td>
</tr>
<tr>
<td>2</td>
<td>Critical</td>
<td>1hr</td>
<td>2hr</td>
<td>2d</td>
</tr>
<tr>
<td>3</td>
<td>High</td>
<td>2hr</td>
<td>4hr</td>
<td>3d</td>
</tr>
<tr>
<td>4</td>
<td>Medium</td>
<td>4hr</td>
<td>8hr</td>
<td>4d</td>
</tr>
<tr>
<td>5</td>
<td>Low</td>
<td>8hr</td>
<td>16hr</td>
<td>5d</td>
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*Times are in business hours/days

SLA- Off hour support
  - Only Priority 1 incidents or alerts are responded to within defined SLA as noted in the chart above.

All other priorities are assigned and addressed during operational business hours.
The relationship continues and currently AFS Acceptance and UDT are considering recommendations for new architecture, addressing disaster recovery improvements, and refining their more stable operating environment. The basics are taken care of, now we can move on to address other projects, she said.

AFS maintains a relatively small but vital in-house IT staff, relying on UDT’s deep bench of specialized expertise to address issues as needed. “I think of UDT as my partner,”

**UDT Response:**

**Reference Experience 1:**
Since 1996 AFS Acceptance has provided full-service auto financing for franchise and independent car dealers. As a recent member of the “Inc. 5000” list, AFS knows that it needs the IT capabilities that customers expect from an up-and-coming financial enterprise ... and it chose United Data Technologies to help put those capabilities in place for AFS.

The Plantation, Florida-based company found that its IT system and service requirements outstripped its ability to retain head count; it required support personnel with knowledge of “the AFS way”; and, it needed a strong professional bench to provide supplemental support to accommodate growth.

“UDT was a good choice for its breadth of expertise,” said Lisa Sipe, Chief Information Officer for AFS. “We were at the mercy of, let’s say, ‘fragile artifacts’: the reliability of some servers was in doubt. They were susceptible to breakdown, threatening sensitive information. It was not a stable infrastructure.” As AFS planned to add new systems for better reliability and scalability, it went looking for a reliable partner to help build an infrastructure for tomorrow.

During the search process, “References about UDT and its service quality were outstanding,” said Rich Brand, Chief Technology Officer with QAT Global, a consultant retained by AFS. “Their technical and sales presentation fulfilled all requirements. Their sales staff responded to AFS’s shifting needs during the RFP period. And, they came highly recommended by trusted advisor to senior AFS management.”

UDT worked with AFS on multiple levels: they offered a managed services approach with a team to manage the infrastructure for stability, scalability and reliability. In addition, AFS was migrating to Microsoft Office 365 software as a service. And, UDT was able to provide help desk support, to get AFS through the transition. “It was nice to leverage for day-to-day support as well as special requirements,” said Sipe.

Even the best transitions bump up against challenges, she conceded. “It’s easy to find a fair-weather partner, but that’s never the case. The best part about UDT is how they worked through difficulties, put a great conflict resolution process in place, and showed a real desire to see the customer succeed.”

The relationship continues and currently AFS Acceptance and UDT are considering recommendations for new architecture, addressing disaster recovery improvements, and refining their more stable operating environment. The basics are taken care of, now we can move on to address other projects, she said.
said Sipe. "The role they play is something I don't have, and we're working together as colleagues, not competition."

**Reference Experience 2:**
*Miami Dade County Public Schools*
Contract type: Multiple Contracts / Project Based

Recent Project Volume: 150 SMA Servers HP ML350 (Student Management Appliance)

Services Provided: Project Management, Imaging, Configuration, and Asset Tagging, Delivery and Installation, Reporting and Ongoing Uplifted Support Services

Summary: UDT, as a large partner with Miami Dade County Public Schools, recently deployed 150 SMA Servers to 150 individual sites in a short window. This deployment was fully managed by UDT and included shipment of servers at UDT Configuration and Operations Center, imaging management and deployment, asset tagging, scheduling and delivery logistics, installation and detailed reporting. This critical and complex rollout was successfully completed by UDT by working with both the hardware supplier as well as the end user contacts on a daily basis to maintain proper communication, schedule coordination and status updates. In addition, this deployment led to a second phase of an additional 150 servers which we are currently rolling out summer 2015.

The servers were rolled out in support of the Digital Learning Convergence initiative the district is undergoing are also deployed and managed by UDT. Over the summer of 2014 UDT successfully imaged, configured, and deployed 40,000 units within a 6 week period. As previously mentioned, UDT works primarily in the Public Sector environment and has built its business delivery models around this segment. By doing this, it has allowed UDT to develop public sector best practices when it relates to overall account management and continued services to maintain infrastructure and managed services.

**Reference Experience 3:**
*Orange County Public Schools*
Contract type: Multi-year Agreement; Sole Source

Annual Volume: 10,000 Desktops, Laptops, Tablets

Services Provided: Imaging, Configuration, Asset Tagging, Delivery and Installation, Reporting

Summary: Orange County Public Schools was experiencing multiple order, delivery and configuration issues. UDT was engaged by the hardware partner to assist in streamlining these processes and as a result, UDT now receives all equipment at its Orlando-based Client Services and Operations Center. This allows the UDT account team to manage all project logistics and perform the imaging, configuration and asset tagging based on the
customer delivery schedule. Upon customer readiness, UDT is able to just-in-time delivery and install, which means sites do not have to store the units and as a result, reducing theft. In addition, by allowing UDT to handle all DOA issues, Orange County Public Schools does not deal with the manufacturer to process RMA/DOA units, UDT manages this process for them prior to delivering the units ensuring a complete order is delivered to the site. UDT images, racks and stacks all servers going into the district. Large Deployments are managed by the UDT Project Management Team.

UDT recently imaged, etched, and delivered onsite over 22K Lenovo Devices to multiple school sites. UDT remained in constant communication with the customer for to ensure deadlines were met. After delivery, UDT is now has transitioned to the Managed Services Team for ongoing support.
Section 3 – Project Approach

Present your understanding of the Village’s needs as a Florida municipality and the scope of services required. Describe how your firm would approach each of the following:

Review and analysis of the Village’s current IT network, systems, staffing, and software programs and process;

The strategic plan should involve a thorough analysis of the following areas: A secondary objective of this RFP is to retain a firm to eventually work with a to-be-established Steering Committee to create a well-documented strategic plan to guide the IT and Communications Department over the next five years in planning, procuring, implementing and managing current and future technology investments and resources

A. Existing infrastructure, staffing, funding applications, business systems, projects, processes and other investments and resources currently in use by the Village.

B. Identification, prioritization and cost analysis of projects that the IT and Communications Department should undertake over the next five years.

C. Practical and relevant private and public sector industry standards.

D. Identification of needs to accommodate current and future technology requirements such as data storage and management, legal requirements and security requirements.

UDT Response:

See below for UDT findings and needs requirement after performing a brief onsite survey.

a. Existing Infrastructure consists of several buildings. There are less than 10 servers with a limited number of network devices. There are approximately 100 users connecting to the network. There are a few applications that are critical to the functionality of the business, including a Document Management solution as well as Foxpro. There are 2 PBX solutions (Nortel PCS400) they have Metro E connections.

b. If UDT is selected, we will perform a thorough assessment and will be able to provide a prioritization schedule. However, at a glance, UDT has identified that a network refresh (new Switches, firewalls) would secure the IT environment to facilitate the business needs for years to come and incorporate any new technologies the Village would like to implement (for instance Voice of IP, Offsite backup, Shared Storage, Virtualization). After a network refresh, a virtualized environment with shared storage between would be recommended. The main reasoning is for risk mitigation, this would expand on the Disaster Recovery, Business Continuity, and redundancy of the overall IT infrastructure. This Solution we would also recommend putting in a more enterprise level Backup/Business Continuity solution. Due to the location of the Village, this is critical to maintain the business during unforeseen events. These enhancements would produce long-term savings in cooling and power, as well as, provide scalability and flexibility for the future growth.
c. UDT focuses on Best practice and standards that can scale in any vertical.
d. Upon a thorough assessment and consultation with the IT team at Islamorada Villages of the Islands, UDT will provide a recommendation and documented report and how we would address current and future technology requirements based on the goals of the Villages.

B. Management of each of the ongoing technology needs outlined in Section IV. Scope of Services.

Ongoing technology needs include the following service areas:

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<td>During the onsite survey UDT was made aware that the current email solution is not hosted in house. As part of our NOC services UDT will work with existing vendor and manage and monitoring in real-time the email solution as well as the public DNS related to the Website of the village. If the Villages decides to change this, UDT will be more than happy to provide direction, options and manage transition if required.</td>
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<td><strong>Desktop Computing:</strong> Support for desktop computing hardware devices and associated operating system software, laptop and notebook computing, local and network printers, scanners, copiers, hand-held computing devices. The Village currently participates in a lease program with Dell Financial Services for systematic replacement and upgrade of desktop computers in four-year cycles</td>
<td>UDT Managed Solution can manage Desktops as part of our offering. UDT will manage the patching and antivirus of workstations and servers. UDT does have the capability of providing hardware either as a service, a purchase, or a lease option. We will support user devices as well as most peripherals.</td>
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<td><strong>Help Desk:</strong> Prioritize and respond to service requests from Village staff, responding after normal business hours as situationally required.</td>
<td>We provide helpdesk for the entire village staff. We will provide 24/7 coverage. We have a process to triage any incoming calls or tickets. We have SLA’s that are defined Impact vs. urgency.</td>
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**Server Maintenance and Backups:** Provide preventive, diagnostic and remedial support to maintain the Village's servers, including performance of daily, weekly and monthly backups. Future considerations include virtualization and consolidation solution.

With our Managed Solution, we can manage Servers. We provide antivirus as needed, we also provide security patching for all windows servers. We can manage backups and design a structure for backup retention. We cooperatively work with onsite IT to design a plan to test all backups and restores to adhere to business requirements.

**Data Network:** services and activities required to provide and support the Village's computer network environment, including LAN, wireless distribution systems, network security, VOIP and internet domain name management.

UDT has the full capabilities to manage and maintain the network, including but not limited to:
- Switches
- Firewalls
- routers
- Wireless AP/Controllers
- Voice Over IP Phones
- Network Security
- External Domain Management
This is all dependent the current setup within the network at the village.

**Voice and Video Telecom:** Record, archive and broadcast bi-monthly Village Council meetings, occasional workshops and monthly Local Planning Agency meetings.

Village has a Nortel system that we will provide vendor management. We will contact the vendor for any issues and own the process to completion.

**Business Continuity and Disaster Recovery:** Facilitate, guide and collaborate with Village staff in conducting impact analyses on the Village’s technology infrastructure and ability to provide services in the event of a natural or other disaster. Future creation and development of a continuity plan and/or disaster recovery plan.

We can manage backups and design a structure for backup retention. We cooperatively work with onsite IT design to a plan to test all backups and restores to adhere to business. We also work with Staff to design a more robust business continuity process.
**Software Application Support:** Patch installation, testing and monitoring; security patches; upgrades; troubleshooting. Internal software development is limited to utilizing the customizable features of the applications and any specified custom reporting. Responsibility for meeting these needs normally falls on the staff that primarily utilizes the software applications in daily operations. Long-term and future needs include implementation of software changes and upgrades, and augmentation of staff efforts to reconfigure software as needed. In 2015 the Village will be implementing a new fund management software system for its finance and accounting activities that will likely require guidance and oversight. Assistance in this regard and with future GIS updating and mapping would be required.

**Web and Internet:** Enhancement of the Village’s website and expanded use of social media to promote transparency and public communication, as identified by the Village Council as priorities beginning in fiscal year 2014-2015. The Village’s website is currently externally hosted. The Village would like to enable staff in other departments of the Village to make changes, delete and add content to web pages as needed without affecting core web site formatting and functionality.

**Security System:** The IT and Communications Department is responsible for maintaining the security systems for the Administration and Public Safety Building and the three (3) Fire Rescue Stations, which includes access badge issuance.

**UDT Managed Services** has the capability of managing a Physical security solution for access control.

<table>
<thead>
<tr>
<th>UDT Managed Services</th>
<th>UDT's core competency is not web development however, depending on the requirement we have relationships with 3rd parties that can assist us as needed. UDT will own the incident from inception to completion.</th>
</tr>
</thead>
<tbody>
<tr>
<td>UDT Response</td>
<td>UDT does provide windows patching for all workstations and servers. We have testing process for all patches prior to deploying. UDT will own the incident from inception to completion.</td>
</tr>
</tbody>
</table>

In order to fulfill the needs described above and meet the requirements for quick response and specialized services, the Village may retain more than one (1) qualified firm to perform the services described in the RFP, in whichever manner the village deems most responsive to the Village’s needs. No minimum quantity of work or compensation for the work will be assured to the firm(s) retained and the Village shall not be prevented in any manner from retaining other firms at its sole discretion.

**UDT Response:**
UDT has read and acknowledged.
Section 4 – Project Timeline and Fee Schedule

Provide unit (per hour) or total annual fees for the service areas identified in the Scope of Services section of this RFP and for facilitating strategic planning. Provide a suggested timeline within which each of the needs described above would be addressed, and identify deliverables as appropriate.

<table>
<thead>
<tr>
<th>Device to be Managed</th>
<th>Quantity</th>
<th>Service Level</th>
<th>Total</th>
<th>Extended Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Servers</td>
<td>6</td>
<td>Managed</td>
<td>$78.00</td>
<td>$468.00</td>
</tr>
<tr>
<td>Network Gear</td>
<td>15</td>
<td>Managed</td>
<td>$54.00</td>
<td>$810.00</td>
</tr>
<tr>
<td>Desktop</td>
<td>60</td>
<td>Managed</td>
<td>$5.00</td>
<td>$300.00</td>
</tr>
<tr>
<td>ISP</td>
<td>1</td>
<td>Managed</td>
<td>$42.00</td>
<td>$42.00</td>
</tr>
<tr>
<td>NAS Devices</td>
<td>4</td>
<td>Managed</td>
<td>$114.00</td>
<td>$456.00</td>
</tr>
<tr>
<td>Backup</td>
<td>1</td>
<td>Managed</td>
<td>$42.00</td>
<td>$42.00</td>
</tr>
</tbody>
</table>

Managed Services Annual Fee
(36 Month Minimum Contract Required)
(Total Monthly Cost) (12 Month Total)

One Time On-boarding Cost | 1 | Onboarding | $3,850.00 | $3,850.00 |

1st Year Total | $29,266.00

Recommended Optional Services:

Help Desk Add On Module (Per Month) | 1 | Help Desk | $1,960.00 |

COIT (Includes 1 Day a week /8 Hours (Per Month) | 1 | COIT | $1,716.00 |

Please note the following services will be billed on a Time and Material Basis as needed per project:

Voice and Video Telecom, Business Continuity and Disaster Recovery, Software Development, Web and Internet.
Section 5 – State of Authorization to Transact Business

Provide proof of authorization to transact business in the State from the Florida Secretary of State

2015 Florida Annual Resale Certificate for Sales Tax

THIS CERTIFICATE EXPIRES ON DECEMBER 31, 2015

Business Name and Location Address

UNITED DATA TECHNOLOGIES INC
6025 NW 21ST TER
DORAL, FL 33172-2421

Certificate Number

23-8011978164-4
State of Florida

Minority, Women & Florida Veteran Business Certification

United Data Technologies, Inc.

Is certified under the provisions of 287 and 295.187, Florida Statutes for a period from:

12/10/2013 to 12/10/2015

Craig J. Nichols, Secretary
Florida Department of Management Services
In accordance with the RFP, sealed Proposal packages must be submitted by either certified mail or in person to the Village Clerk no later than 3:00 pm on May 1, 2015.

Question: Can I just submit my paperwork to the City as stated in the RFP? Or do I have to use DemandStar?

Answer: No. Proposers are not required to sign up as a Planholder in DemandStar to respond to this RFP.

Question: Can I just submit my paperwork to the City as stated in the RFP? Or do I have to use DemandStar?

Answer: In accordance with the RFP, sealed Proposal packages must be submitted by either certified mail or in person to the Village Clerk no later than 3:00 pm on May 1, 2015.
This addendum forms a part of the Request for Proposals (RFP) and clarifies the original Request for Request for Proposals as noted.

* * *

I. The RFP is hereby revised as follows (strike-thru indicates items deleted or replaced and underline indicates items added or revised):

Islamorada, Village of Islands, will receive formal Proposals for Information Technology (IT) Consulting and Support Services, per specifications and scope of services established from time to time, until 3:00 p.m. on May 1, 2015 3:00 p.m. EST on May 15, 2015. Proposal packages will be opened by the Village Clerk at 3:15 p.m. EST on May 15, 2015.

All inquiries and requests for clarification or interpretation regarding this Request for Proposals shall be made in writing to the attention of the Procurement and Grants Administrator by mail to 86800 Overseas Highway, Islamorada, Florida 33036; by email to ana.hernandez@islamorada.fl.us; or by fax to (305) 664-6464 no later than April 24, 2015 May 7, 2015.

* * *

REMAINDER OF PAGE INTENTIONALLY LEFT BLANK
This addendum forms a part of the Request for Proposals (RFP) and clarifies the original Request for Proposals as noted.

* * *

I. The following answer is provided in response to written questions presented to the Village Procurement and Grants Administrator by potential proposers:

**Contract Proposal**

**Question:** Do you feel that multiple options in the proposal would be good? We are thinking to provide one overall contract proposal but were also thinking to provide something that is strictly hourly. Do you think it best just to provide one option instead of two?

**Answer:** An overall contract cost proposal along with an hourly rate schedule would be the best approach.

**Question:** Is it possible for an extension of the RFP Deadline for One (1) week from May 1st, 2015 to May 8th, 2015?

**Answer:** The deadline to submit the proposals has been extended to May 15, 2015. See Addendum 2.

**Question:** Could you delineate the weight ratings for each of the IT vendor selection criteria with respect to the proposal scoring?

**Answer:**
Scoring suggested by Village Manager; to be revised and agreed to by Selection Committee prior to review of proposals received:

- Cover Letter 10 points
- Company Overview 20 points
- Experience 20 points
- Project Approach 15 points
- Timeline & Fees 15 points
- State Authorization 10 points
- Local Business 10 points
- TOTAL 100 points
**Question:** The RFP states the following:

*Project Management Experience / Project Examples*

Provide at least three examples of successfully implemented application development projects that demonstrate experience with integrated project delivery, change management, vendor management, software development and configuration and business process analysis preferably in a local government setting. Include the client name, project name, project location and summary of services performed.

The above mentions application Development projects. Is this asking us to provide 3 projects where we developed (coded) the application or is this asking for 3 projects we implemented and managed.

**Answer:** Three projects that the firm implemented and managed. Assistance with configuration and implementation of out of the box software may be requested, but development of original software programs and applications customized for the Village and resulting from writing computer code would not be requested.

**Technical Information**

**Question:** What are the current applications that you are using for Software Application Support?

**Answer**

- **Village-wide**
  - Microsoft Office Applications 2007-2013
  - OnBase Document Management System

- **Building, Planning & Code Enforcement**
  - CityView 2014

- **Building & Planning**
  - ARC GIS

- **Fire Rescue**
  - Firehouse Station Automation

- **Finance**
  - Current software: New England Municipal Resource Center, Inc. (NEMRC); General Ledger, Accounts Payable, Cash Receipts, Fixed Assets, Payroll
  - Negotiating contract with Tyler Technologies to implement Incode Financial Management, Personnel Management, Customer Relationship Management and Content/Document Management Suites

**Question:** What is your current implemented hardware?

**Answer:** Dell servers/workstations/notebooks – 7 locations

  - Canon production copiers/scanners – 4 locations
Question: What links are between your buildings?

Answer: Ubiquiti Wi-Fi Networks in Founders Park

Question: What processes do you have in place today?

Answer: Dell OpenManage for servers
LabTech 2013 for all network devices

Question: What is your current backup plan and Retention period?

Answer: ShadowProtect server/workstation imaging per evening, week, monthly off-site, yearly off-site.

Question: Can you provide more information on your Security System and the maintenance required for it?

Answer: GE Topaz security

Contract Award

Question: Can you please clarify this line on page 4 of the RFP? "No minimum quantity of work or compensation for the work will be assured to the firm(s) retained and the Village shall not be prevented in any manner from retaining other firms at its sole discretion."

Answer: The firm retained will not have a guaranteed minimum amount of work nor minimum amount of compensation. The contract between the Village and the Consultant is non-exclusive and the Village may retain other firms for the same work.
This addendum forms a part of the Request for Proposals (RFP) and clarifies the original Request for Proposals as noted.

* * *

I. The following answer is provided in response to written questions presented to the Village Procurement and Grants Administrator by potential proposers:

**Project Requirements**

**Question:** Does the Village desire that the selected consultant give and/or facilitate presentations during the project? If so, at what milestones and to what audiences?

**Answer:** At this time, we do not anticipate that any presentations will be needed during the project. The strategic plan will be a staff-based effort for use mainly for budget purposes. Any information or conclusions resulting from the process will be presented to the Village Council by staff.

**Question:** Does the Village desire regular status updates/reports for the duration of the project? If so, at what frequency (e.g., bi-weekly, monthly)?

**Answer:** We do not anticipate that regular status updates or reports will be needed. Status updates will occur through interaction with a steering committee comprised of staff.

**Question:** Does the Village anticipate the selected consultant will need to meet with the various departments that receive IT support services? If so, with how many departments and at what organizational level (e.g., Village leadership, management, end users) does the Village expect the consultant to conduct these meetings?

**Answer:** The strategic plan will be developed by working with a steering committee comprised of staff—mainly department directors and/or managers. In meeting with the steering committee, the consultant would facilitate the process to develop a strategic plan.
Question: Does the Village envision that meetings with department staff will be conducted at a central location or at multiple locations throughout the Village?

Answer: For the strategic planning process, meeting would be conducted with the steering committee at a centralized location.

Question: Has the Village developed an IT Strategic Plan in the past, either internally or with the assistance of a consultant? If so, can it be shared?

Answer: The Village has not developed an IT strategic plan previously. We are doing so mainly in response to financial audit management letter comments.

Technical Information

Question: Would the Village provide a list of the existing core set of IT policies and procedures currently in place?

Answer: We do not have formalized IT policies and procedures to provide at this time.

Proposals

Question: Does the Village have a preference for contracting a local firm for this work? If so, what weight will this have in the evaluation process?

Answer: As stated in the RFP, the Village will consider and apply local preference. Out of 100 points currently proposed for evaluation of proposals (please see Addendum #3), 10 are proposed for providing local preference documentation.

Question: Given that “selected firm(s) may provide support in one, some or all of the IT functional areas identified,” may an offeror submit a proposal to perform only the 5-year IT strategic planning and/or business continuity planning portions of the Scope of Services?

Answer: Yes.

Contract Award

Question: Has the Village identified a budget for the requested services, and if so, can it be shared?

Answer: The Village has not yet identified a budget.