

**RFP HACL-2021-043**  
**Enterprise Content Management System**

Issue Date: **October 1, 2021**  
Title: **Managed IT Services**

Question Deadline: **Wednesday, October 13, 2021 at 12:00pm**

Due Date: **Wednesday, October 20, 2021 at 2:00pm**

Issuing Agency: Lumberton Housing Authority  
407 N. Sycamore St.  
Lumberton, NC 28358

Period of Contract: The initial term or period of the contract shall be until project completion with the effective date to be determined at time of award.

Point of Contact: Steven Harrell, Chief Operations Officer, sharrell@lumbertonhousing.org

**All inquiries should be submitted through Housing Agency Marketplace.**

Bids should be directly sent to Housing Agency Marketplace. Emailed proposal shall not be accepted. The offeror is fully responsible to ensure that your proposals arrive in completion to the designated location.

In compliance with this Invitation for Bid and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed bid or as mutually agreed upon by subsequent negotiations. The undersigned further certifies that he/she is authorized to sign this document on behalf of the submitting firm.

\_\_\_\_\_

Name of Firm

Date: \_\_\_\_\_

\_\_\_\_\_

Address of Firm

By: \_\_\_\_\_

Signature

\_\_\_\_\_

City and State

Zip Code

Name: \_\_\_\_\_

Print Name and Title

Phone No.: \_\_\_\_\_

Fax No.: \_\_\_\_\_

Email: \_\_\_\_\_

FEI/FIN No.: \_\_\_\_\_

NOTE: Changes to this RFP may be issued in the form an addendum at any time prior to the due date and time for submitting proposals. Housing Agency Marketplace will send any addendums to any vendor who directly received a copy of the RFP. Any vendor who did not directly receive a copy of the RFP from Housing Agency Marketplace is encouraged to visit the web site regularly to learn of any changes to the solicitation. HACL's purchasing regulations require each offeror to acknowledge receiving a copy of the addendum by the proposal due date and time or included with the firm's response to the solicitation.

Confirmation that all ADDENDUMs have been received: \_\_\_\_\_ of \_\_\_\_\_ addendums as of 20 October 2021.

## 1. **PURPOSE**

The HACL is requesting proposals from qualified firm(s) to provide Information Technology Services, including maintaining and further developing the Information Systems of the Housing Authority, including all software applications, workstations, file servers and network systems and all on-line systems, including e-mail and Internet access, all as described in this Request for Proposals. The HACL is committed to transitioning into a digital operational environment by 2024.

The HACL is currently housed in a temporary office facility at 407 N. Sycamore St, Lumberton, NC with an expected transition to a new administrative building in March 2022. The Responder will be responsible to assist setup and develop a new IT infrastructure in the new facility.

The current environment is as follows:

- Internet
  - Spectrum Fiber at current administrative building.
  - Spectrum wifi at each community center (10)
- Major Application Software
  - MRI Tenmast WinTen2+ - (SAS w/ backup)
  - Microsoft O365 Environment GCC1 (Office suite, Teams, Sharepoint, OneDrive, etc)
  - Adobe
  - exacqVision
  - Currently soliciting for enterprise content management (digital file system)
- Server Environment
  - Not currently established, but will be upon award of enterprise content management.
- Workstations
  - 4 – Dell laptops running Windows 10
  - 16 – HP ProBook Intel Core i3 laptops running Windows 10
  - 2 – Microsoft Surface Tablets
  - 15 – Samsung Galaxy Tab A

The future infrastructure will include the following:

- Electronic file/document retention server(s)
- VOIP phone system
- HID card integrated door access hardware/software

## 2. **BACKGROUND**

The Lumberton Housing Authority was chartered by the City of Lumberton, North Carolina in 1949 as a government unit to provide low-income citizens with safe, clean, and affordable housing and help improve their quality of life. The City Mayor appoints the Board of Commissioners; we currently have a seven (7) member board. The Housing Board governs the hiring of the Executive Director and has ultimate responsibility to ensure that the agency operates in compliance with HUD and Federal Government policies. The HACL is responsible for the administration of 729 public housing units dispersed in 12 communities throughout the city, The Authority is also the primary manager of Robeson County's Housing Choice Voucher / Section 8 voucher program, which consists of 596 residents. In total, the Lumberton Housing Authority provides support for over 1,330 families in the Robeson County and City of Lumberton area.

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In 2016, Hurricane Matthew devastated the Authority through the 100% loss of its administrative operations files and facilities, and 34% (267 units) of our 729-unit inventory.

### **3. SMALL, PHA RESIDENT-OWNED, WOMEN-OWNED, MINORITY-OWNED AND SECTION 3 BUSINESSES AND INDIVIDUAL PARTICIPATION**

HACL is committed to providing quality housing and economic opportunities for our residents and the neighborhoods we serve. One of the major requirements for this is Section 3 of the HUD Act of 1968, which requires that HUD funds provide low-income individuals with a springboard for economic empowerment through direct participation in construction and other activities that are designed to physically improve and revitalize the communities in which they live.

It is the policy of the HACL to contribute to the establishment, preservation, and strengthening of small businesses, businesses owned by women, minorities and Section 3 businesses and individuals to encourage their participation in procurement activities. HACL encourages contractors to provide for the participation of small businesses, businesses owned by women, minorities, and Section 3 businesses and individuals through partnerships, joint ventures, subcontracts, or other contractual opportunities. If you are not a Section 3 business concern then a plan for involvement of these types of businesses is required.

By submitting a bid, the Offeror certifies that all information provided in response to this RFP is true and accurate.

### **4. GENERAL REQUIRMENTS**

Interested firms are invited to submit their qualifications along with at least three (3) references that are in similar in this RFPs statement of work, for consideration.

Submittal Rejection: Lumberton Housing Authority has the right to reject any and all submittals and waive any irregularities therein if it is found to be in the best interest of Lumberton Housing Authority. Submittals not received by the required deadline are ineligible for consideration and will not be opened. Lumberton Housing Authority may change the deadline at any time in order to assure adequate review of the submittals.

Contract and Method of Payment: The final form of contract and scope of services will be negotiated between Lumberton Housing Authority and the top ranked firm after the selection process is complete. Invoices with proper documentation can be submitted on a monthly basis.

Lumberton Housing Authority assumes no liability for costs incurred by firms in responding to the Request for Proposals or interview process. All submittals become a matter of public record upon submission.

Insurance Requirements: Generally, the following coverage is required:

- o Commercial general liability--\$150,000 per person and \$1,000,000 per occurrence.
- o Worker's Compensation Insurance--equal to or at least \$100,000 per employee
- o Automotive Insurance--\$100,000/\$300,000 for bodily injury and \$50,000 for property damage.
- o Errors and Omissions Insurance

Federal Fair Housing Laws: Lumberton Housing Authority does business in accordance with the Federal Fair Housing Law (The Fair Housing Amendments Act of 1988). It is illegal to discriminate against any person because of race, color, religion, sex, handicap, family status, national origin, or sexual orientation.

No bid may be withdrawn after the scheduled closing time for the receipt of bids for a period of sixty (60) days.

## **5. GENERAL SCOPE OF SERVICES STATEMENT**

The project director for the project should be identified as such. It is expected that this person will direct all facets of the contract, and be available as point-of -contact for the HACL. The proposal will set forth every person who is proposed to perform services on the contract. If the Responder desires to replace persons who have been identified as those who will perform work on the contract, it shall be done only with the HACL approval. Services are to be provided only by the persons described in the Responder's proposal or by such other persons that have been approved by the HACL in writing to provide services.

Services will be provided on an "as needed" basis, as determined by the HACL, for a term of two-years from the date of contract award, with the HACL having the option to extend the contract for three additional one-year terms. The hours of services shall be determined by the need of the HACL. It is estimated that the HACL will need approximately twenty to thirty hours of services per month; however, in some months the HACL will require more hours and in some months, less. In particular, it is estimated that there will be increased hours during the first six months of the contract due to the opening of a new administrative building. The HACL will provide office space and supplies, a telephone, pc, printer and access to the HACL's business machines, including copier and fax, to be used for Authority purposes only (all equipment shall remain Authority property.) The Responder will not be considered an HACL employee and will not be entitled to employee benefits. The Responder will receive compensation at the hourly rate only for hours of services actually performed and billed. The HACL will not reimburse for travel expenses unless such travel is for HACL business AND is authorized in advance by the HACL. (The HACL will not reimburse for commuting expenses.) Other expenses incurred on behalf of the HACL are approvable for reimbursement only if they have been authorized in advance by the HACL. The HACL reserves the right to contract with other vendors for services that fall within the scope of this contract, including, but not limited to, employee training, software and hardware installation, website design. The Responder is hereafter referred to as the "IT Provider". Subject to instruction and direction from the HACL's Executive Director or his/her designee, the IT Provider will be responsible for maintaining and developing the Information Systems of the HACL, including all software applications, all workstations and peripherals, phone systems, the file servers and network systems, email and all on-line systems, including Internet access.

### **5.1 SCOPE OF SERVICES**

- Basic network system maintenance, including: establishing and enforcing protocols, performing setups, troubleshooting problems, administering print and periphery functions, assessing configurations, installing hardware and software or overseeing their installation, and conducting systems backups;
- Ongoing development of the network system, including maintenance of the HACL's remote office capability;
- Security and protection of the entire system, including: virus protection, control of access and maintenance of security codes, physical security of the network, and disaster preparation and prevention, and maintenance of all backup systems;
- Provide a proper environment for the server room, ensuring that it is clean, secure and well organized;
- Maintenance of all workstations, controlling the selection and loading of software applications, troubleshooting local desktop problems, tracking and utilizing warranties and licenses as applicable and functioning as a helpdesk to all HACL staff;

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- Maintenance of Microsoft Office 365 virtual environment, management of Sharepoint environment, Internet and e-mail capacity for all designated HACL staff;
- Make recommendations to HACL concerning personal training needs and training needs of end-users;
- Maintain detailed records of all activities, including daily maintenance of the IT Department work order tracking system;
- Report user problem to vendor(s), as appropriate, maintaining logs and following through with vendor(s) to ensure resolution;
- Work with HACL staff to develop and maintain adequate security procedures and disaster plans, including the implementation of organization-wide read and write access for end-users, based on need;
- Develop operating manuals for all areas of responsibility in a format approved by the Executive Director or his/her designee;
- Assist in developing annual IT Department planning and budget recommendations;
- Make recommendations to Executive Director or his/her designee concerning possibilities for cost reduction and greater efficiencies;
- Participate in user groups and professional organization as approved by the Executive Director or designee;
- Develop, implement and document preventive maintenance procedures for all areas of responsibility;
- Develop specifications for the purchase of any software, hardware, or other IT equipment desired by the HACL;
- Provide on-demand response to IT requests;
- Establish a maintenance schedule for approval by the Executive Director or designee and perform maintenance service after hours and on weekends in situations which would least likely disrupt daily operations;
- Adhere to confidentiality of computer information and data, to include the signature and adherence to confidentiality clause that information in the system must remain confidential under penalty of law;
- Perform other related duties as assigned by the Executive Director or designee.

## 6. COMPENSATION

The compensation shall be in accordance with the following provisions, as well as those additional terms set forth under the prospective Contract:

Respondents shall indicate its proposed fees detailing cost for junior and/or senior tech support. The fees proposed for the initial term shall be valid for ninety (90) days from the date proposals are due. The fees for the option terms shall be fixed during each option term(s) and are not subject to change after execution of a contract.

In the proposed fee, the hourly rate must be “fully loaded” (i.e. inclusive of all clerical support, reports, and materials supplied that are necessary for performing services under this RFP). These rates shall include any overhead and/or profit. HACL, at its sole option, may require Respondents to provide a breakdown of overhead and/or profit by title. If there are reimbursable costs associated with providing the Services under this RFP, they are to be identified. The award of a contract under this RFP will not be based solely on the fee. The Fee Proposal will be used to determine the Respondent, otherwise deemed to be qualified, is considered to be within the competitive range for the Services to be provided.

## **7. BASIS OF CONTRACT AWARD**

Following the evaluation of proposals, HACL shall award a contract to the responsible Responder whose proposal will be most advantageous to HACL, considering price, remuneration and any other factors specified in this RFP.

Subject to the availability of funds, HACL may negotiate a contract with the successful Responder(s). Any contract awarded pursuant to this RFP shall be made to the responsible Responder(s) whose proposal is determined to be the most advantageous to HACL, price and technical factors considered. Award will not necessarily be made to the Responder(s) submitting the lowest price.

HACL does not guarantee (a) any minimum amount of a contract awarded hereunder; nor (b) the extent, quantity or portion of any services to be performed or items to be provided pursuant to an award to any one or all the successful Responder(s). Further, HACL may: (c) reject any and all proposals received; (d) accept other than the lowest priced proposal; (e) waive any minor irregularities or technicalities in proposals received; (f) make a single award or multiple awards under this RFP for the performance of any, all or any combination of the items delineated under the Scope of Services; (g) accept any item or combination of items proposed unless precluded elsewhere in the solicitation; (h) amend this solicitation as permitted by applicable law; or (i) cancel this solicitation in its entirety or any portion thereof.

## **8. PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS**

### **8.1 RFP Response**

In order to be considered for selection, offerors must submit a complete response to this RFP. Electronic submittals will be accepted through Housing Agency Marketplace in accordance with instructions. Electronic submittals will not be accepted via email or fax. Offerors assume sole and full responsibility for the timely delivery of the proposals in both the Housing Agency Marketplace and in paper format. Late proposals will not be considered. All proposals will become a part of HACL's official files and will not be returned to the offeror.

### **8.2 Proposal Preparation**

- a. The Offeror's proposal must include all parts, materials, labor, travel, lodging, taxes, and shipping.
- b. Proposal shall be signed by an authorized representative of the offeror. All information requested should be submitted. Failure to submit all information requested may result in HACL requiring prompt submission of missing information.
- c. Proposals which are substantially incomplete or lack key information may be rejected by HACL or given lowered evaluation of the proposal. Mandatory requirements are those required by law or regulation or are such that they cannot be waived or subject to negotiation.
- d. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP.
- e. The Offeror must quote price as a "Total Base Bid" so that HACL can use the appropriate funding designation.

### **8.3 Oral Preparation**

Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to HACL. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact finding and explanation session only and does not include negotiation. HACL will schedule the time and location these presentations. Oral presentations are an option of HACL and may or may not, be conducted.

### **8.4 Specific Proposal Instruction**

Proposals should be as thorough and detailed as possible so that the HACL may properly evaluate your capabilities to provide the required goods/services. Offerors are required to submit the following items as a complete proposal:

- a. The RFP cover sheet and all addenda(s) acknowledgment(s), if any, signed and filled out as required. Provide information that the person signing the RFP is authorized to bind the firm(s).
- b. All HUD Forms, Statement of Offeror's Qualification, attachments to the RFP, and other specific items or data requested in the RFP.
- c. A complete detailed resume of the Offeror and other relevant information which would demonstrate the capacity, resources, experience and expertise of the Offeror in performing the above-described services.

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d. References (3) of current/previous, similar work to this proposal request.

e. Cost of the Proposal. All costs incurred, directly or indirectly, by the Respondent in response to and in preparation of this RFP shall be the sole responsibility of the Respondent and shall be borne by the Respondent. Proposers shall not include any such expenses as part of their proposals.

f. References. Interested firms shall submit their qualifications along with at least three (3) references of like statements for work for consideration.

5) The HACL informs all prospective contractors of the following:

a. Clarification to Proposals. The HACL reserves the right to obtain clarifications of any point in a company's proposal or to obtain additional information necessary to properly evaluate a particular proposal. Failure of a proposer to respond to such a request for additional information or clarification could result in rejection of the company's response or responses. HACL may conduct interviews with one or more agencies for such purposes.

b. Cancellation of the RFP. The HACL reserves the right to cancel this RFP at any time, for any reason, and without liability if cancellation is deemed to be in the best interest of the HACL. The proposer assumes the sole risk and responsibility for all expenses connected with the preparation of its proposal.

c. Identification. The Contractor agrees to identify, defend and hold harmless HACL and its authorized officers, employees, agents and volunteers from any and all claims, actions, losses, damages, and/or liability arising out of this RFP or subsequent contract from any cause whatsoever, including the acts, errors or omissions of any person and for any costs or expenses incurred by HACL on account of any claim therefore, except where such indemnification is prohibited by law.

d. Suspension/Debarment. The Contractor shall provide a certification statement that the firm is not debarred, suspended, or otherwise prohibited from professional practice by any Federal, State, or Local agency.

e. Americans with Disabilities Act. Proposer must comply with all applicable requirements of federal and state civil rights law and rehabilitation statutes.

f. Choice of Law. The resulting contract will be entered into within the State of North Carolina and the law of said state, whether substantive or procedural, shall apply to the contract, and all statutory, charter and ordinance provisions that is applicable to public contracts within Robeson County and the state of North Carolina shall be followed with respect to the contract.

g. Choice of Contract. A committee of staff selected by the Executive Director will evaluate the proposals that are received. All proposals will be evaluated on the evaluation criteria and responsiveness to the Scope of Work as stated in this RFP.



## 9. EVALUATION FACTORS

The proposal should address the factors outlined under each Project, below:

**9.1 Qualifications** of assigned personnel, including a list of all key members of the firm who will be committed to this project and indicate their job function(s) and title(s). Indicate the level of effort, area of expertise and function of each member assigned to the Agency. Submit an organizational chart to show how the key members will be involved. Include résumés for each member, highlighting the education, work experience, professional licenses/registrations that are relevant to the scope of work in this RFP.

**9.2 Experience** in and demonstrated success providing information technology services to Public Housing Authorities.

**9.3 Capacity** to provide information technology services in a timely manner with limited notice and within a confined time line. Describe the human and technical resources available to you for rendering the services requested in this RFP, including the geographic location of offices and support staff that will be committed to the Agency. Respondent should provide a chart, which clearly describes quantities and duration of time commitment for members of the team.

**9.4 Responsiveness of Proposal:** The proposal will be evaluated for clarity; for the fee structure in relation to the services to be provided; and for completeness of the submission including required certifications and documentation. The Responder must demonstrate in the proposals, an understanding of the requirements set forth in this solicitation. The Responder is advised that the proposal may not merely offer to provide services in accordance with the requirements of PBCHA’s Scope of Services or specifications.

**9.5 Price Reasonableness:** List the hourly billing rate of each individual who will be committed to this Agency, relative to the scope of services. The proposed fees must be reasonable. The proposal fees are not subject to increase during the effective period of the Notice of Award through the term of the proposed Contract.

SELECTION CRITERIA	MAXIMUM POINTS
<b>Qualifications</b> of assigned personnel, including a list of all key members of the firm and any consultant(s) or subconsultants(s) who will be assigned to the Agency.	10
<b>Experience</b> in and demonstrated success in completing the services described in the Scope of Services in collaboration with Public Housing Authorities.	25
<b>Capacity</b> - ability to provide information technology services in a timely manner with limited notice and within a confined time-frame.	25
<b>Responsiveness</b> – Completion, clarity and correctness of all RFP Requirements.	10
<b>Price Reasonableness</b> - List the hourly billing rate of each individual who will be committed to the agency, relative to the scope of services. The proposed fees must be reasonable.	30
<b>TOTAL</b>	<b>100</b>