



**East Bay Regional Park District**  
Oakland, California

**Request for Proposal:**

**Information Technology Five-Year Strategic Plan  
and Assessment**

**Issued: May 23, 2022**

**Response Due: July 1, 2022 at 5:00PM PST**

## Table of Contents

I.	Description of Work.....	1
II.	Background on the Park District.....	2
III.	Scope of Service .....	3
IV.	Deliverables .....	4
V.	Proposal Requirements.....	5
VI.	Evaluation Procedures.....	7
VII.	General Information .....	8
VIII.	Questions During the Proposal Period.....	9

### I. Description of Work

The East Bay Regional Park District (“Park District”) is inviting qualified firms to submit their proposals to provide the Park District with a comprehensive five-year Information Technology Strategic Plan, that shall assess and define Park District’s information technology objectives and goals and provide a “road map” for planning, prioritizing, coordinating, funding, and staffing of the information technology projects.

To be considered, please submit a proposal as well as all other required documentation by **5:00 pm on Day, July 1, 2022** via email to [cio@ebparks.org](mailto:cio@ebparks.org). Submissions received after the deadline will not be considered.

Inquiries concerning the RFP should be addressed to [cio@ebparks.org](mailto:cio@ebparks.org). There will be one bidder’s conference call at 10:00AM June 6, 2022, where bidding parties can ask questions to gain greater context on the Park District information technology environment that will help in their response.

Proposals submitted will be evaluated by staff from the Finance & Management Services Division. Additional information and clarifications may be requested. Recommendation of the firm selection is planned to be presented to the Finance Committee of the Board of Directors at the July 27, 2022 meeting.

The RFP package and additional information may be obtained free on the Park District’s website at [www.ebparks.org](http://www.ebparks.org) or by contacting [cio@ebparks.org](mailto:cio@ebparks.org)

## II. Background on the Park District

The Park District was incorporated in 1934 as a California Special Park District. The Park District operates under Sections 5500-5595 of the Public Resources Code of the State of California for the purpose of acquiring park, recreation and open space land; and the development, operation and maintenance of these lands.

The Park District operates 73 parks, 1,330 miles of trails, covers more than 122,000 acres within Alameda and Contra Costa counties, and is the largest regional park district in the country. The Park District provided services to 2.8 million residents in Alameda and Contra Costa Counties. The Park District is governed by a seven-member publicly elected Board of Directors; and is administered by a General Manager. It has a permanent staff of approximately 900, which is augmented by approximately 300 seasonal staff growing to a total of 1,200 annually.

In addition to the stewardship and development of parks, the Park District provided community outreach and education, digital learning, and naturalist programs, among many recreational programs. The Park District has a Public Safety function, including Police and Fire services, as well as multiple corporation yards, rental facilities, and other operational support locations.

The Park District Information Services Department is comprised of 9 employees, headed by Chief Information Officer who reports to Assistant General Manager of Finance and Management Services/Chief Financial Officer (CFO).

Current Park District operating platforms include a hybrid of on-premises and cloud-based applications. The Park District used the Office 365 suite of products, with a majority of Microsoft Windows and some Apple operating systems. There are approximately 1,200 computers (laptop or desktop) that are assigned to staff. The IS Department is directly responsible for acquisition and maintenance of the mission critical systems, including infrastructure hardware and software, communications internet and intranet, cybersecurity, Financial System, Public Safety, Reservations, Human Resources, Public Affairs.

More detailed information on the Park District is available on the Park District's website at <http://www.ebparks.org/>

### III. Scope of Service

The goal of the Information Services (IS) Department is to proactively support, maintain, secure and enhance the Park District's digital enterprise, including information technology hardware, software and communications, in a resilient, responsive, professional and cost-effective manner.

The purpose of the RFP is to solicit proposals from qualified professionals with experience in Information Technology needs and operations of local government to develop a formal 5- year Information Technology Strategic Plan for the Park District that will assess current state and provide recommendations for future technology needs, based on industry best practices. This includes technology systems, telecommunications, hardware, software and staffing to support information services.

#### SCOPE OF SERVICE

Perform a comprehensive assessment of the Park District's existing information technology environment including human capital; and identify the key internal and external factors - strengths, weaknesses, opportunities and threats (SWOT analysis).

- Analyze and provide recommendations on the Park District's current technology environment. This includes, but not limited to:
  - Infrastructure (including but not limited to):
    - Telecommunications
    - Hardware
    - Software
    - Cybersecurity
  - Administration:
    - Policy
    - Business systems/applications
    - Workflow processes
    - External supports services from partners/vendors
    - Staffing levels
    - Sourcing of services and solution
    - Funding
- Assess the Park District's current Information Services department structure to ensure that it best meets the Park District's technology needs through the most appropriate service provision agreements, resource availability (including staffing) and reporting relationships.
- Identify practical and relevant public sector industry standards for Cybersecurity, IT Contingency Plan for Incident Response, Disaster Recovery, Business Continuity and Risk Management.

- Identify best practices for policy and processes related to information technology and where improvements can be made.
- Identify existing and available managed services/outsourcing relationships and opportunities.
- Evaluate and identify means and approaches to accommodate current and emerging technology requirements, major trends and upgrades facing the Park District.
- Assess customer needs by meeting with all levels of management and other key technology internal customers, as well as IS.
- Identify workflow processes to ensure efficient service management and delivery to business units and the public.

## IV. Deliverables

Deliverables to be provided include a 5-year IT strategic plan addressing the above listed topics, and any other issues that would be identified in the assessment process.

- 1.) A draft strategic plan, comprised of an executive summary, findings, and prioritized recommendations shall be produced and submitted to the Park District CIO and CFO, for consideration and comments. The draft report should identify near-term actions that can be taken and built-upon, and other steps that should be undertaken in subsequent years. With consent of the CIO, Contractor may proceed to finalize the strategic plan.
- 2.) The Final strategic plan shall be issued following comments on the draft, and will be comprised of:
  - a. An executive summary that effectively communicates the information reviewed
  - b. A summary of findings and prioritized recommendations
  - c. A comprehensive documentation of findings and prioritized recommendations
  - d. A project plan outlining projects by priority that includes timelines and cost estimates.

All information gathered during the project and work products and deliverables must be treated as confidential and may not be revealed to any outsider without specific prior written permission of the Park District.

In addition, the firm will conduct an in-person presentation to the Park District Board of Directors. The report should provide sufficient information for policy decisions regarding operational and service options.

Any report and documentation prepared by the Consultant shall be provided to the Park District both in hard copies and an electronic format. Fifteen (15) copies of the Final Report will be required along with an electronic copy.

This project shall be completed within 90 calendar days of contract award, with the draft version ready at a checkpoint 45 calendar days into the engagement.

## V. Proposal Requirements

The following materials should be submitted with the proposal.

### I. **Cover Letter**

The cover letter should briefly state:

- a. The firm's profile, including size (revenue and staff) and location(s), and whether it is local, regional, national, or international, and the location from which the work would originate.
- b. The firm's understanding of the work to be performed, the commitment to perform the work in the required timelines, and why the consultant believes it is best qualified to perform the duties and tasks outlined and described in scope of work contained in this request. It should be signed by an official with the legal authority to commit the resources of the firm.
- c. Provide any substantiated complaints against the firm in the last 5 years and any outstanding litigation.

### 2. **Qualifications**

The proposal should include the following information and materials:

- a. **Qualifications and Related Experience of Personnel Who Will Perform Work.** Identify the consultant and management staff who will be assigned to the engagement and provide one-page resumes for each person that will be assigned to this engagement.
- b. **Prior Relevant Experience.** A description of prior IT strategic plan work to other similar agencies with similar populations and characteristics that relevant to the Scope of Service outlined.
- c. Provide a sample of IT strategic plans you have prepared for other similar agencies.
- d. **References of public sector clients, preferably local government, multi-jurisdictional agencies, and special districts that overlay multiple municipalities.** Please include a list of at least three (3) current and/or previous clients for which a consultant assigned to the project has rendered professional services similar to the scope of service outlined and described in this request.

### **3. Approach, Scope, and Timelines**

Provide a proposed approach and projected timeline to conduct and complete each step in the Scope of Service.

### **4. Cost**

- a. Cost Estimate with justification.
- b. Justification of hours and costs may be required prior to final selection; and will be required prior to execution of a contract. Not to exceed terms will be in awarded contract.
- c. Proposal shall include hourly rates for all personnel on the project.
- d. Proposal should include options for reducing or adding services at the discretion of the Park District.

### **5. Insurance Coverage Requirements**

Consultant shall carry at its own cost and expense, insurance as required below:

1. Commercial General Liability Insurance, occurrence form, with a limit not less than \$1,000,000 for each occurrence. If such insurance contains a general aggregate limit, either it shall apply separately to this project or be no less than two times the occurrence limit. General liability insurance shall be primary and non-contributory with respect to any insurance or self-insurance program of the park District, its boards, commissions, officers, agents, employees, and volunteers.
2. Auto mobile Liability Insurance, occurrence form, with a limit not less than \$1,000,000 for each occurrence. Such occurrence shall include coverage for owned, hired and non-owned automobile.
3. Workers Compensation Insurance: statutory coverage for Workers Compensation Employer's Liability (\$500,000 per accident). Workers Compensation shall comply with California Labor Code Section 3700 and contain a waiver of subrogation in favor of the Park District.

All insurance shall include the Park District, its elected and appointed officers, employees, and volunteers as additional insured with respect to this project, and the performance of project to be approved by the Park District. The coverage shall contain no special limitation on the scope of its protection to the above-designated individuals.

No change in insurance may be made without the approval of the Park District.

The Park District requires (30) days written notice of cancellation of any insurance required. Additionally, the notice statement on the certificate should not include the wording "endeavor to" or "but failure to mail such notice shall impose obligation or liability upon company, its agents or representatives".

All insurance shall be evidenced, prior to commencement of service, by properly executed policy endorsements in addition to certificate of insurance.

In addition to requiring that contractor provide insurance certificate showing the levels and types of coverage required for the project or contract, the Park District also requires the contractor to provide the Park District with a copy of the actual endorsement(a document that modifies the terms of the underlying policy and is issued by the insurance company itself, rather than a broker) to the commercial, general, automobile, and excess liability insurance policies that show the Park District, its boards, commissions, officers, agents, and employees have been named as additional insured by insurer.

If the contractor maintains broader coverage and/or higher limits than the minimums shown above, the Park District requires and will be entitled to the broader coverage and/or higher limits maintained by the licensee's Contractor.

#### **6. Standard Park District Agreement**

Attached as Appendix "A" is the Park District standard form professional services agreement. Please review the agreement. You must be willing to sign the agreement "as-is" or with minimal changes that the Park District must agree to prior to firm selection. If you will have significant issues with the agreement's terms and conditions, please re-consider submitting an RFP. shall carry at its own cost and expense, insurance as required above.

The Park District reserves the right to reject any or all RFPs, whether or not minimum qualifications are met, and to modify, postpone, or cancel the RFP without liability, obligation, or commitment to any party, firm, or organization. In addition, the Park District reserves the right to request and obtain additional information from any candidate submitting an RFP, and to waive any minor informality or irregularity.

A PROPOSAL MAY BE REJECTED for any of the following reasons:

- Proposal received after designated time and date.
- Proposal not containing the required elements, exhibits, nor organized in the required format.
- Proposal considered not fully responsive to this RFP.
- Proposal contains excess or extraneous material not called for in the RFP.

## **VI. Evaluation Procedures**

Proposals will be evaluated by the Park District staff using the following criteria. Firms meeting the mandatory criteria will have their proposal evaluated and scored for both technical qualifications and value for price. The following represents the principal selection criteria, which will be considered during the evaluation process:

- Experience & Expertise
  - Previous experiences with local municipalities/government agencies, Public Safety (Police and Fire)



- Previous related work experience and qualifications in the strategic information technology planning
- Demonstrates a clear knowledge of IT and operations
- Demonstrates a clear understanding of scope of work and other technical issues related to this project
- Resources
  - Availability of essential personnel based on current workload and future commitments including how many hours each person will dedicate to the project
  - Adequacy of amount and quality of resources
- References
  - References and recommendations of previous clients
  - History and performance of firm/project team on similar projects
- Cost of Services

## VII. General Proposal Information/Requirements

1. The Park District reserves the exclusive right on its selection of a consultant.
2. All proposals submitted in response to this RFP become the property of the Park District and are subject to the requirements of the California Public Records Act (California Government Code Section 6250 et seq.) Once a successful proposal is identified or all proposals are rejected, all proposals shall be deemed public records. The proposer must identify in writing all copyrighted material, trade secrets, or other proprietary information the proposer claims are exempt from disclosure under the Public Records Act. Proposers claiming exemption must include the following statement in their proposal:

*The proposer agrees to indemnify and hold harmless the Park District, its officers, employees, and agents from any claims, liability, or damages against the Park District, and to defend any action brought against the Park District for proposer's refusal to disclose such material, trade secrets, or other proprietary information to any party.*

Failure of a proposer to include this statement and/or identify in writing the claimed exempt material shall be deemed a waiver of any exemption from disclosure under the Public Records Act. Requests to review proposal submissions will not be allowed until after a Staff Recommendation is made.

3. The Park District reserves the right to cancel or reissue the RFP or revise the timeline at any time.
4. The Park District reserves the right to reject any and all proposals and to waive minor irregularities in the proposal process. The Park District may accept any proposal if such

action is believed to be in the best interest of the Park District.

5. Issuance of this RFP does not commit the Park District to award an agreement or to pay any costs incurred in preparation of a Proposal or any response to this RFP. There is no expressed or implied obligation for the Park District to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.
6. The Park District reserves the right to negotiate scope and cost with the consultant.
7. The project team shall be approved by the Park District. The Park District must approve any changes in the project team.
8. All materials submitted to the Park District will become the property of the Park District and will not be returned.
9. There is no expressed or implied obligation for the Park District to reimburse responding firms for any expenses incurred in preparing proposals in response to this request. Materials submitted by respondents are subject to public inspection under the California Public Records Act (Government Code Sec. 6250 et seq.), unless exempt.

## VIII. Questions During the Proposal Period

For any question that arise during the proposal period, all questions can be sent to [cio@ebparks.org](mailto:cio@ebparks.org). The Park District will make an effort to respond to all relevant questions but may not given time constraints. To ensure fair competition, all proposers will receive the same information and materials; no telephone or personal inquiries about this RFP will be answered.

There will be one bidder's conference call/virtual meeting on June 6, 2022, at 10AM PST, where bidding parties can ask questions to gain greater context on the Park District information technology environment that will help in their response. Details of bidders call will be sent to bidders expressing interest by June 3, 2022

### **COVID-19 Acknowledgment**

COVID-19 ACKNOWLEDGMENT, WAIVER AND ASSUMPTION OF RISK: The Contractor acknowledges that the novel coronavirus, COVID19, is extremely contagious and is believed to spread mainly from person-to-person contact. As a result, federal, state, and local governments and health agencies recommend social distancing and have, in many locations, prohibited the congregation of groups of people. The Contractor acknowledges and agrees that the East Bay Regional Park District is directing all individuals that participate in permitted activities to conduct the activities in compliance with the applicable Federal, State, County, and local health orders. Further, any volunteer recognizes that it is their own responsibility to ensure compliance with all applicable orders. Further, the Contractor acknowledges and understands that the East Bay Regional Park District does not and cannot guarantee that any participants will not become infected with COVID-19 while participating in the permitted activities. The Contractor hereby releases, covenants not to sue, discharges, and hold harmless the East Bay Regional Park District, its Board of Directors, officers, employees, agents, and representatives from any claims, including all liabilities, actions, damages, costs, or expenses of any kind arising out of or relating to the permitted activities including but not limited to any illness, death, and loss of any kind by volunteers related to COVID-19. The Contractor understands and agrees that this waiver, release, and assumption of risk includes any claims based on the actions, omissions, or negligence of East Bay Regional Park District, its Board of Directors, officers, employees, agents, and representatives, whether a COVID-19 infection occurs before, during, or after participation in any activity.

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Name

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Title

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Signature

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Date