



**COMMUNITY ACTION CORPORATION OF SOUTH TEXAS**

Microsoft Office 365 Migration  
and Implementation(RFP)

PROPOSALS DUE:  
March 27, 2020

**Attn: Jason Muller**  
**IT Director**  
[jason.muller@cacost.org](mailto:jason.muller@cacost.org)

Community Action Corporation of South Texas  
204 E. First St.  
Alice, TX 78332

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**REQUEST FOR PROPOSAL (RFP)**  
**Microsoft Office 365 Migration and Implementation**

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**INTRODUCTION**

The Community Action Corporation of South Texas (CACOST) is a private non-profit organization established in 1971 and funded through state and federal grants and fees for service. CACOST has a workforce of 690 employees and a service area consisting of seventeen south Texas counties. The mission of CACOST is to continuously improve the lives of south Texans by providing high quality healthcare, education, housing, and economic opportunities to reduce poverty through services and partnerships. More information on CACOST can be obtained by visiting the CACOST web site at [www.cacost.org](http://www.cacost.org).

**GENERAL CONDITIONS**

**Purpose**

CACOST is seeking proposals for migration and implementation of Microsoft's Office 365 hosted exchange environment to replace its current Google Apps for Business Suite email system and the full suite of existing Microsoft Office products currently in use by employees. Included in this project, CACOST will be upgrading its existing Security software licenses detailed below. All work must be completed in accordance with all applicable standards, and other specifications, terms, and conditions as stated in this RFP. The project should provide CACOST with a hosted and secure Microsoft Office 365 solution and coordinating licensing, migration, and support, as detailed below

**Submission Information**

**Closing date**

Proposals must be submitted no later than 5:00 pm, March 27, 2020.

**Inquiries & Contact Person**

All questions concerning this RFP should be directed to Jason Muller, IT Director, at [jason.muller@cacost.org](mailto:jason.muller@cacost.org). Communication with other individuals will not be allowed. CACOST reserves the right to disqualify any Proposer who is found in violation of this provision. No questions other than written via email will be accepted, and no response other than written will be binding upon CACOST. Submittals will remain on file in accordance with the Texas Open Records Act.

**Costs of Preparation**

All costs incurred in the preparation of the response to this RFP and any associated costs will be the sole responsibility of the Proposer and will not be reimbursed by CACOST.

## **Submission Instructions to Proposers**

To be considered responsive and receive an evaluation, proposals must fully address all sections of the RFP. Your proposal should be addressed as follows:

Community Action Corporation of South Texas  
RFP for Microsoft Office 365 Migration and  
Implementation  
ATTN: Jason Muller, IT Director  
204 E. First St.  
Alice, Texas 78332  
OR via email to [Jason.Muller@cacost.org](mailto:Jason.Muller@cacost.org)

It is the sole responsibility of the Proposer to ensure that the proposal is received by the date and time specified above. **LATE PROPOSALS WILL NOT BE CONSIDERED.** Confirmation of receipt is the sole responsibility of the Proposer. Proposal submissions may include value-added alternatives and any relevant information in addition to the information requested in the RFP. Proposals may be withdrawn in writing prior to the deadline. Unless otherwise stated, all materials submitted by the Proposer in response to this RFP shall become the property of CACOST.

## **Notification of Award**

CACOST anticipates, but does not guarantee, a contract or multiple contracts will be awarded on or around the week of April 27, 2020. Award will be made to the Proposer(s) based on the listed evaluation criteria and the responses that are most compatible with CACOST's needs. CACOST will be the sole judge in making this determination.

CACOST is not bound to accept the lowest bid or any proposal submitted. A contract for the approved proposal will be executed based upon the factors described in this RFP. The term of this Agreement will be on a month-to-month basis.

CACOST may investigate the qualifications of any individual or firm under consideration, require confirmation of information furnished and require additional evidence of qualifications to perform the services described in this RFP. The Agency also reserves certain rights, including, but not limited to, the following:

- a. Reject any or all of the proposals
- b. Issue subsequent Requests for Proposals
- c. Cancel the entire Request for Proposal
- d. Remedy technical errors in the Request for Proposal process
- e. Appoint evaluation committees to review qualifications and proposals
- f. Seek the assistance of outside technical experts in evaluation
- g. Approve or disapprove the use of particular subcontractors
- h. Establish a short list of proposers eligible for discussions after review of

RFP

- i. Solicit best and final offers from all, some, or one of the proposers
- j. Waive informalities and irregularities in RFP
- k. Award without discussion
- l. Cancel an awarded contract if performance is unsatisfactory, with the provision of a written notice; no penalty and/or fee may be imposed
- m. Conduct pre-contract negotiations with any and/or all potential qualified contractors

This RFP shall not, in any manner, be construed to be an obligation on CACOST to enter into a contract or result in any claim for reimbursement of cost for any efforts expended in responding to the RFP or in anticipation of any contract.

**Expected Timelines**

<b>Event</b>	<b>Date(s)</b>
<b>RFP Notification Posting</b>	March 4, 2020
<b>Proposal submission due</b>	March 27, 2020
<b>The announcement of Intent to Award</b>	April 17, 2020
<b>Estimated Contract Date</b>	April 27, 2020

**ADMINISTRATIVE INFORMATION**

**Background Information**

CACOST is a private non-profit organization funded by federal, state and local grants with an estimated budget of \$47 million in funds and match. The Information Technology department consists of Five (6) individuals: A Director of Information Technology, Three Technicians, Help Desk Manager, and an IT Assistant.

**ADDITIONAL TERMS & CONDITIONS**

**Confidentiality**

The Proposer agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to CACOST, the Proposer agrees not to publish, reproduce or otherwise divulge such information, in whole or in part, in any manner or form, or authorize or permit others to do so taking such reasonable measures as are necessary to restrict access to the information while in the Proposer’s possession to these employees on the Proposer’s staff who must have the information on a “need-to-know” basis. The Proposer agrees to notify immediately, in writing, CACOST’s authorized

representative in the event the Proposer determines or has reason to suspect a breach of this requirement.

### **Limitations and Reservations**

CACOST reserves the right to negotiate the terms and conditions of the contract with any of the evaluated Proposers. Should the successful Proposer and CACOST fail to come to an agreement, CACOST may at its sole discretion award work to any of the remaining Proposers. The Proposer to whom the contract is awarded shall be required to enter into a written contract with CACOST. This RFP and the proposal, or any part thereof, shall be incorporated into and made a part of the final contract.

CACOST specifically reserves the right to vary the provisions set forth herein any time before the execution of a contract where such variance is deemed to be in the best interest of the needs of CACOST.

If selected for negotiations, Proposer may be required to prepare and submit additional information before final Proposer(s) selection, to reach terms for the provision of services, which are agreeable to both parties.

### **Small, Women and/or Minority-Owned Business**

Efforts will be made by CACOST to utilize small businesses and women and minority-owned businesses with the consideration that the primary responsibility is the most favorable return to CACOST. A Proposer qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 CFR 121.201).

### **Equal Opportunity**

It is the policy of CACOST not to discriminate on the basis of race, color, creed, gender, religion, marital status, age, national origin or ancestry, physical or mental disability, medical condition, sexual orientation, political affiliation or belief or any other consideration made unlawful by applicable federal, state or local laws. Contractor agrees not to discriminate against any employee or applicant for employment to be employed in the performance of this Agreement, with respect to hiring, tenure, terms, conditions, and privileges of employment, or a matter directly or indirectly related to employment, because of age or race, color, creed, gender, religion, marital status, age, national origin, or ancestry, physical or mental disability, medical condition, sexual orientation, political affiliation or belief. Contractor further agrees that every subcontractor entered into for the performance of the Agreement shall contain a provision requiring non-discrimination in employment herein specified, binding upon each subcontractor. Breach of the covenant may be regarded as a material breach of the Agreement.

### **Stevens Amendment**

This project will be supported by the U.S. Department of Health and Human Services (HHS) funds and we will comply with the Stevens Amendment.

## **COMPLIANCE WITH STATE AND FEDERAL LAWS**

### **Historically Underutilized Businesses**

It is CACOST policy to encourage participation of small and historically underutilized businesses (HUBs), as defined in Government Code, Chapter 2161.

“Historically underutilized business (HUB): means an entity with its principal place of Business in this state that is:

- a corporation formed for the purpose of making a profit in which 51 percent or more of all classes of the shares of stock or other equitable securities are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the corporation's control, operation, and management;
- a sole proprietorship created for the purpose of making a profit that is completely owned, operated, and controlled by an economically disadvantaged person;
- a partnership formed for the purpose of making a profit in which 51 percent or more of the assets and interest in the partnership are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the partnership's control, operation, and management;
- a joint venture in which each entity in the venture is a historically underutilized business, as determined under Government Code Chapter 2161; or.
- a supplier contract between a historically underutilized business as determined under Government Code, Chapter 2161 and a prime contractor under which the historically underutilized business is directly involved in the manufacture or distribution of the goods or otherwise warehouses and ships the goods.

### **Certification with Regard to Lobbying**

No federal appropriated funds will be paid to any person for influencing or attempting to influence an officer or employee of Congress or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant or loan, the entering into of any cooperative agreement or the extension, continuation, renewal, amendment or modification of any federal contract, grant, loan, or cooperative agreement.

### **Equal Employment Opportunity**

The Equal Employment Opportunity Clause required under Executive Order 11246, the affirmative action commitment for disabled veterans, recently separated veterans, other protected veterans, and Armed Forces Service Medal Veterans, the affirmative action clause for handicapped workers and the related regulations of the Secretary of Labor, 41 CFR Chapter 60, are incorporated by reference in the contract. By accepting the contract, vendor certifies that it complies with the authorities cited above, and that it does not maintain segregated facilities or permit its employees to perform services at locations

where segregated facilities are maintained, as required by 41 CFR 60.

### **Prohibited Substances in the Workplace**

The contractor is considered a representative of CACOST while carrying out the duties of the contract. CACOST has a policy that prohibits the possession and/or use of alcohol or illegal drugs when conducting CACOST business. If the contractor is observed engaging in this type of behavior while performing any aspect of the contract, termination of the contract will occur.

### **Debarment and Suspension**

The contractor certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

### **SCOPE OF SERVICES**

The Proposer shall be capable of providing the following Microsoft Office 365 Migration and Implementation at a minimum under this contract:

1. Migrate inboxes from G-Suite to Microsoft Office 365
2. Submit detailed migration plan with timeline
3. Provide detailed communications and training plan for staff
4. Provide detailed end-user documentation on how to use new platforms as well as videos if applicable
5. Assist with any applicable upgrades that could benefit overall adoption of software systems.
6. Assist with creation of Office Suite installer for CACOST Computers

Proposer shall be prepared to submit detailed billing statements for all services billed at an hourly rate, if any, broken down into time increments of no less than a quarter hour. Proposer shall also include summaries of work performed and time spent on services performed under the flat monthly fee, as discussed below.

### **Proposal Requirements and Scoring**

Respondents to this RFP shall include the following minimum information in their proposal:

## **A. REQUIREMENTS**

### **1. Office 365 Readiness Assessment.**

- a. Onsite review of client systems to gather and capture information about existing infrastructure.
- b. Identify potential challenges and propose solutions.
- c. Recommend a solid communications and training plan for CACOST users based on best practices such as: lunch and learns; web-based training; and, desk materials.
- d. Microsoft Active Directory integration.
- e. Identify mailbox size and item counts that will be migrated to Office 365.
- f. Networking and Naming Services Planning.
- g. Determine required tasks for configuring network and DNS.
- h. User Identity and Account Provisioning Planning.
- i. Planning considerations to implement directory synchronization.
- j. Plan for Active Directory Federation Services for use with single sign-on.
- k. Exchange Online Planning.
- l. Develop migration strategy
- m. Skype for Business or Teams online services planning.
- n. Office 365 services planning.
- o. SMTP services planning.
- p. Assessment and documentation of client configurations, including identification of necessary changes from current configuration standards.
- q. Compliance search, e-discovery, archive, mailbox quota and retention planning.
- r. Bandwidth and connectivity assessment to calculate migration cadence.
- s. Data loss prevention planning.
- t. Identification of all Microsoft licenses required for expected general and scenario-specific use cases.
- u. Identification and planning of roles based administration and the separation of duties following the principle of least privileges.
- v. Identification and planning of necessary reports for performance, health and usage metrics of Office 365 messaging services, including administrator activities.



## **2. Migration Preparation**

- a. Exchange online service configuration.
- b. Develop migration strategies for Office 365.
- c. SMTP service configuration.
- d. Secure messaging configuration.
- e. Initial retention policy configuration.
- f. Initial data loss prevention policy configuration.
- g. Anti-spam and anti-malware protections configuration.
- h. Conditional access for Microsoft Outlook, Outlook Web Access and managed mobile access configuration.
- i. Configuration of compliance, e-discovery, and archive components, including policies and roles-based access.
- j. Configuration of outlook web access and exchange active sync, including condition access requirements where appropriate.
- k. Preparation of reports for usage, performance and service health metrics.
- l. Preparation of reports for auditing of administrative activities, including provisioning and de-provisioning, compliance/e-discovery activity, and configuration changes.

## **3. Migration and Cutover**

- a. Assign licenses to users.
- b. Migrate and synchronize mailbox data to exchange online.
- c. Migration of the retention policy.
- d. Perform post-migration end-to-end testing of Office 365 messaging services, including scenario-specific services and mobile device access where appropriate.
- e. Perform post-migration end-to-end testing of instant messaging, group IM and internal video calling.
- f. Propose a comprehensive backup solution for Office 365, server and data.

## **4. Administrator Training, Documentation and Knowledge Transfer**

- a. Onsite training of IT staff for:
  - Administration Office 365 messaging services,
  - Creation and administration of archive and retention policies
  - Responding to e-discovery and legal hold requests.
- b. Office 365 administration best practices, including roles based controls and separation of duties.
- c. Creating reports for activity, performance, health and access:
  - Administrator documentation detailing all configurations pertaining to retention, archiving

- and disposition of email
- d. Administrator documentation detailing all configurations of latest Skype for Business/Teams and SharePoint online services.

**5. End User Documentation, Knowledge Transfer, and Training**

- a. General end-user documentation and training on the new Office 365 messaging environment, including OWA.
- b. General end-user documentation on changes necessary on mobile devices to use Active Sync in the new messaging environment.
- c. General end-user documentation on archive, archive policies and, retention policies

**6. Licensing**

- a. 750 – NFP O365 E3 Standard Seats.
- b. 750 – NFP O365 E5 Security O365 Add-on

**B. SUPPORT & SECURITY**

**1. Customer Support.** Respondent should note the company’s general customer support structure. This includes listing all the ways Clients can access support, the availability of support, and any conditions which would limit support access. One contact for all support needs would be preferred.

**2. Technical Support.** Respondent should note the company’s technical support structure. This includes Client access to support, availability of support, and any conditions which would limit support access.

**C. Evaluation**

**II.**

Experience and Qualifications of Firm.	25 points
Approach to Work (migration, implementation and training plans).	25 points
Experience providing similar services to similar entities.	25 points
Pricing/ Fees.	25 points
<b>Total</b>	<b>100 points</b>

## **PROPOSAL EVALUATION**

In accordance with applicable laws, rules and regulations for public purchasing, an award will be made to the responsible proposer whose proposal is determined, after evaluation by assigned staff to be the best value to CACOST. The proposal must be submitted on time and must materially satisfy all mandatory requirements identified above to qualify for evaluation. A written acceptance mailed or otherwise furnished to the qualified proposer and a fully executed contract is required prior to commencement of any work under this RFP.

This Request is seeking to identify the Proposer most qualified to provide Microsoft Office 365 Migration and Implementation. CACOST, in its sole discretion, will determine the most qualified Proposer to provide the services based on the information in the response submittals. The Proposers may be asked to interview with CACOST representatives, make an oral presentation and/or respond to questions regarding the submittal response. CACOST may elect to negotiate pricing with one or more of the most qualified Proposers. CACOST, in its sole discretion, will make its final selection of the Proposer whose experience, expertise, reputation, capabilities and past performance is determined to be best suited for the performance of the services. CACOST contemplates award of the contract to the responsible Proposer(s) with the highest total points. Protest procedures are available upon request and must be submitted within (10) days of award determination for consideration.

### **Evaluation Criteria**

A committee selected by CACOST will review and evaluate all proposals and make the final determination. Each proposal will be evaluated according to the responses to items listed in Section C.