



**Request for Proposal (RFP) for Information Technology
(IT) Services**

**For Boone County Regional Sewer District
(BCRSD)**

Proposal #01-2025

**Submittal Deadline:
not later than 2:00 P.M. CST
June 27, 2025**

Direct Responses To:

**Jesse Stephens
Interim Executive Director**

**jstephens@bcrsd.com
P: (573) 443-2774
bcrsd.com**

Issued Date: May 28th, 2025

Contents

Notice of Request for Proposal	2
Background and RFP Overview	3
Instructions and General Conditions	4-5
Proposal Submission Information.....	6-9
Appendix A – Offeror Response and Signature Page	10
Appendix B – Vendor Experience, Expertise, and Reliability Questionnaire.....	11-14
Appendix C – Statement of Qualifications.....	15
Appendix D – Work Authorization Information	16-19
Appendix E – Current BCRSD Technical Environment	20-21
Appendix F – BCRSD Project Scope	22-26
Appendix G - Questions.....	27-28
Appendix H – General Contract Requirements	29-32
Appendix I – BCRSD Standard Terms and Conditions.....	33

NOTICE OF REQUEST FOR PROPOSAL

Boone County Regional Sewer District (BCRSD) is accepting proposals in response to this Request for Proposals (RFP) for the following:

RFP for IT Services – Boone County Regional Sewer District

An on-site pre-proposal meeting will occur at **2:00 p.m. central standard time (CST) on Thursday, June 5th, 2025** at the BCRSD office located at 1314 N. Seventh Street, Columbia, MO 65201. Interested offerors will be able to inspect our facility and examine the existing technical environment. Attendance is optional but encouraged.

Offerors shall e-mail jstephens@bcrsd.com by **5:00 p.m. on Friday June 13th, 2025** indicating their intent to submit a proposal and list any questions they have about the proposal. Failure to indicate intention to submit a proposal response may result in the offeror not receiving addenda or other critical updates for the proposal submission.

Answers to questions received will be e-mailed to all interested offerors by **Friday, June 20th, 2025** and will also be available upon request. Answers to questions received after 5:00 p.m. on Friday, June 13th, 2025 will not be provided.

Sealed proposals will be accepted until **2:00 p.m. CST on Friday, June 27, 2025**, at the office of the BCRSD located at 1314 North Seventh Street, Columbia, MO 65201. Proposals received after 2:00 p.m. CST on Friday, June 27, 2025, will not be opened.

Request for Proposals are available from the BCRSD and requests for copies may be made by phone (573) 443-2774 or e-mail: jstephens@bcrsd.com

1) Background and RFP Overview

- 1.1 **About BCRSD:** The Boone County Regional Sewer District (BCRSD) is a public sewer utility, established as a common sewer district pursuant to Sections 204.250-204.470 of the Revised Statutes of Missouri. Our mission is to provide current and future customers with cost effective, reliable sanitary sewer service by collecting and treating wastewater, and to protect public health and the environment in accordance with local, state and federal permit requirements.
- 1.2 **Objectives and Goals:** With this Request for Proposal (RFP), BCRSD is requesting information about your company and the Information Technology (IT) products and solutions you provide as outlined in the scope requirements for this request. This request is publicly advertised and will be used to evaluate provider options for BCRSD. This document does not commit BCRSD to contract for any service, supply, or subscription whatsoever. BCRSD will not reimburse for any information or administrative costs incurred because of participation in response to the RFP. All costs associated with response will solely reside at the responding party's expense.
- 1.3 **General Scope of Services:** BCRSD is transitioning their IT services away from the Boone Electric Cooperative (BEC), who has historically provided the hardware, network, maintenance, and support of BCRSD's IT infrastructure.

- 1.3.1 **Initial Project:** All hardware, software, and relevant systems will need to be separated from the BEC environment and transitioned to a stand-alone environment. The existing environment is detailed in Appendix E.

Ongoing Needs: BCRSD does not currently have any dedicated IT professionals on staff. We will require all services and tools necessary to maintain our IT systems, improve employee efficiency, and mitigate our risks. Monthly or on-call services should be included as part of this proposal. It is our intention to enter a 3-year contract with an IT service provider, with an optional 2-year contract extension, prior to issuing any future RFP for IT services.

1.4 Key Dates:

Event	Date
RFP Release Date	Wednesday, May 28 th , 2025
BCRSD Site Visit	Wednesday, June 4 th , 2025 – 2:00 p.m. Central Time
Intent to Respond & Questions Due	Friday, June 13 th , 2025 – 5:00 p.m. Central Time
Answers to Questions Posted	Friday, June 20 th , 2025
Proposals Due	Friday, June 27 th , 2025 – 2:00 p.m. Central Time

2) INSTRUCTIONS AND GENERAL CONDITIONS

- 2.1 **Delivery of Proposals:** Sealed proposals, subject to Instructions and General Conditions and any special conditions set forth herein, will be received at the BCRSD office until the proposal closing date and time indicated herein for furnishing the BCRSD with services as detailed in the following request for proposal.
- 2.2 **Proposal Closing:** All proposals must be **delivered by 2:00 p.m. on Friday, June 27, 2025** to:

BCRSD
1314 North Seventh Street
Columbia, Missouri 65201

- 2.2.1 **The BCRSD will not accept any proposals received after 2:00 p.m. on Friday, June 27, 2025.** Late submissions may be returned unopened if the offeror requests within ten (10) business days after bid opening. All returns will be made at the offeror's expense.
- 2.3 **Sealed Proposals Required:** Proposals must be submitted in a sealed envelope identified with the proposal number. List the proposal number on the outside of the box or envelope and note "Response to Request for Proposal enclosed." No fax or electronically transmitted proposals will be accepted.
- 2.3.1 **Copies:** The offeror is advised to submit one (1) original proposal.
- 2.4 **Proposal Opening:** Proposals will be opened publicly shortly after **2:00 p.m. Friday, June 27, 2025**, but only the names of offerors will be read aloud at the proposal opening.
- 2.5 **Confidentiality and the Missouri Sunshine Law:** All proposals submitted in response to this RFP will be opened during a closed committee meeting. After a contract for the services described in this RFP have been executed or all proposals have been rejected, all proposals will be available for public inspection pursuant to Chapter 610 of the Revised Statutes of Missouri (the "Missouri Sunshine Law"). Once available for public inspection, all proposals received will be considered public records for purposes of the Missouri Sunshine Law. Trade secrets or confidential information within a proposal that are protected by law shall remain protected and will not be disclosed for public inspection, in accordance with applicable laws and regulations, but only to the extent such trade secrets or confidential information are (i) clearly identified and specified as such in the proposal and (ii) legally subject to closure pursuant to the Missouri Sunshine Law as determined in the sole discretion of BCRSD.

- 2.6 **RFP Offeror's List:** If the offeror has obtained this proposal document from a source other than the BCRSD, prior to submitting the proposal the offeror is advised to check with the BCRSD to ensure that the RFP solicitation package is complete, i.e., the offeror has all addenda and attachments as applicable. Please reply to the contact listed in section 2.7 below by **June 13th, 2025** to indicate your intent to submit a proposal on the RFP.
- 2.7 **Guideline for Written Questions:** All questions regarding this Request for Proposal must be submitted in writing no later than **5:00 p.m., Friday, June 13th, 2025**. All questions must be e-mailed to the attention of Jesse Stephens at the email address indicated below. All such questions will be answered in writing, and such answers will be provided to all parties having obtained a Request for Proposal packet. Submit questions to:

Jesse Stephens
E-mail: jstephens@bcrsd.com

Answers may not be provided to questions received after 5:00 p.m. on Friday, June 13, 2025.

- 2.8 **RFP Addenda:** In the event that it becomes necessary to revise any part of this RFP, a written addenda will be issued. Any addendum to this RFP is valid only if ***in writing*** and issued by the BCRSD. Verbal conversations or agreements with any officer, agent, or employee of the BCRSD will not modify any terms or obligations of this RFP.
- 2.9 **Notice of Intent to Respond:** Please indicate your intention to respond to this RFP by email to the contact listed in section 2.7 above by **June 13th, 2025**. In addition, please provide the contact details of the individual responsible for coordinating your RFP response. An opportunity will be made available for interested offerors to visit the site on **June 5th, 2025 at 2:00 p.m. CST**. Attendance at the site visit is optional but highly encouraged. Failure to indicate intention to submit a proposal response may result in the offeror not receiving addenda or other critical updates for the proposal submission.

3) PROPOSAL SUBMISSION INFORMATION

3.1. SUBMISSION OF PROPOSALS:

3.1.1 When submitting a proposal, the offeror should include the **original**.

a. The offeror must submit the proposal to:

**BCRSD
1314 North Seventh Street
Columbia, MO 65201**

b. The proposals must be delivered no later than **2:00 P.M. CST on Friday, June 27, 2025**. Proposals will not be accepted after this date and time.

3.1.2 **Terms and Conditions:** The offeror agrees that by submitting an offer, BCRSD's Terms and Conditions as incorporated herein must become part of the contract, and in the event of conflict between any terms the offeror submits, the terms and conditions of the BCRSD must govern.

3.1.3 **Note:** the terms "offeror" and "vendor" are used interchangeably herein and each mean the firm, entity or individual submitting a proposal in response to this RFP.

3.2 ORGANIZATION OF PROPOSAL:

3.2.1 To facilitate the evaluation process, the offeror is encouraged to organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein.

a. Each distinctive section should be titled with each individual evaluation category and all material related to that category should be included therein.

b. The signed response page from the original RFP and all signed amendments should be placed at the beginning of the proposal.

c. The offeror is advised that the proposal should, at a minimum, address all mandatory and desired services, equipment, materials, etc. Responsive proposals will fully describe how the service will be performed.

3.2.2 The offeror is cautioned that it is the offeror's sole responsibility to submit all information related to each of the evaluation categories, and BCRSD is under no obligation to solicit such information if it is not included with the proposal. The

offeror's failure to submit such information may cause an adverse impact on the evaluation of the proposal. Any offeror whose responses deviate from the outlined specifications may automatically be disqualified, or such deviation may be reflected by the deduction of points awarded in the relevant evaluation category.

3.2.3 The offeror should also include the following information in their proposal:

- a. Cover Letter
- b. Brief Overview of the firm
- c. Detailed description of how you deliver your services and why, as well as any tools included in your service delivery (re. backups, cyber security, etc.)
- d. Completed forms of Appendix A, Appendix B, Appendix C, Appendix D,
- e. Cost structure, including upfront one-time fees and ongoing fees, escalation costs from year to year, as well as time and material costs for extra services.
- f. A version of any master services agreement or other contract typically used by your firm. (Note that all terms and conditions are subject to review and approval of BCRSD and may be negotiated with the selected service provider)

3.3 OFFEROR'S CONTACTS WITH BCRSD:

3.3.1 Offeror's Contacts: Offerors and their agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all of their questions or comments regarding the RFP, evaluation of the RFP, or any other matters related to the RFP to **Jesse Stephens, Interim Executive Director**. Offerors and their agents may not contact any other BCRSD employee regarding any of these matters during the solicitation and evaluation process. Inappropriate contacts are grounds for suspension and/or exclusion from specific procurements, and may cause the offer to be disqualified from this RFP. Offerors and their agents who have questions regarding this RFP should contact Jesse Stephens as indicated in section 2.7 of this RFP.

3.4 **VALIDITY OF PROPOSAL RESPONSE:** Offerors must agree that proposals must remain firm for a period of ninety (90) calendar days after the date specified for the submission of proposals.

3.5 EVALUATION OF PROPOSALS

3.5.1 **Evaluation and Award Process:** Only responsive proposals from responsible offerors will be subject to full scoring and evaluation as provided herein. Responsive proposals from responsive offerors are those proposals that satisfy all

mandatory requirements stated in the Request for Proposal. The evaluator(s) will use both objective analysis and subjective judgment in conducting a comparative assessment of the responsive proposals received from responsible offerors. The evaluation will include an assessment of cost and the offeror's experience, expertise and reliability as further provided herein.

- 3.5.2 **In order to conduct an evaluation of proposals**, the vendor is advised to complete the Offeror Response Page, all parts, and to return the completed pages with the vendor's proposal. Failure to provide information necessary to evaluate the vendor's response may render the proposal incapable of award consideration. The BCRSD is not obligated to obtain additional information necessary for evaluation from the vendor. When evaluating responses, the BCRSD reserves the right to consider relevant information and fact, whether gained from the response, from a vendor, from the vendor's references, or from any other source.
- 3.5.3 **Competitive Negotiation of Proposals:** The offeror is advised that under the provisions of this Request for Proposal, the BCRSD reserves the right to conduct negotiations of the proposals received or to award a contract without negotiations. If such negotiations are conducted, the following conditions shall apply:
- a. Negotiations may be conducted in person, in writing, or by telephone.
 - b. Negotiations will only be conducted with potentially acceptable proposals. The BCRSD reserves the right to limit negotiations to those proposals which received the highest rankings during the initial evaluation phase.
 - c. Terms, conditions, prices, methodology, or other features of the offeror's proposal may be subject to negotiation and subsequent revision. As part of the negotiations, the offeror may be required to submit supporting financial, pricing and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the proposal.
 - d. The mandatory requirements of the Request for Proposal must not be negotiable and must remain unchanged unless the BCRSD determines that a change in such requirements is in the best interest of BCRSD.
- 3.5.4 **Evaluation of the Offeror's Experience, Expertise and Reliability:** Award of the contract contemplated by this RFP will be made to the offeror whose proposal is determined by BCRSD to be most advantageous to BCRSD. Experience, expertise, and reliability of the offeror's organization are considered subjectively in the evaluation process. Therefore, the offeror is advised to submit any information

which documents successful and reliable experience in past performances, especially those performances related to the requirements of this RFP and outlines the expertise of key personnel who will be assigned tasks to perform for BCRSD.

- a. **Service Provider Scoring and Selection:** The offeror shall be evaluated according to the following scoring criteria.
 - i. **Price:** This will comprise 40% of the composite score. The lowest responsive bid cost will be awarded a full 40% based on projected one-time costs and on-going costs for the initial conversion and the first three contract years. The offeror shall clearly identify one-time project and onboarding costs to initiate the project. Offerors shall also identify any monthly costs for providing the requested and necessary services. If services are performed on a time and material basis, the offeror shall identify all billing rates and average billable hours estimated for the offeror to perform monthly on-going service to BCRSD. Price will be evaluated based on the initial cost and three years of projected monthly service. Higher bids will be awarded a percentage based on taking the lowest responsive bid cost (L) divided by the cost of the proposal being evaluated (B) multiplied by 40%. ($L/B \times 40\% = \text{awarded percentage}$.)
 - ii. **Service Provider Experience and References:** This will comprise 20% of the composite score.
 - iii. **Service Provider Reliability:** This will comprise 20% of the composite score.
 - iv. **Service Provider Expertise, Schedule for Implementation and Deployment approach:** This will comprise 20% of the composite score.

3.5.5 Rejection / Withdrawal of Proposals Response:

- a. **Rejection of Proposals:** The right is reserved by the BCRSD at its discretion to reject any or all proposals or parts thereof. The BCRSD reserves the right to waive defects or informalities, to negotiate with offerors and to accept the proposal deemed to be in the best interest of and most advantageous to the BCRSD.
- b. **Withdrawal of Proposals:** Proposals may be withdrawn on written request from the offeror at the address shown in the solicitation prior to the time of acceptance.
- c. **Negligence on the part of the offeror in preparing the proposal confers no right of withdrawal after the time fixed for the acceptance of the proposals.**

Appendix A – Offeror Response and Signature Page

(The offeror should complete and return this with the proposal)

In compliance with this Request for Proposal and subject to all the conditions thereof, the offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this proposal and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies. When providing a Contact Name and E-Mail Address below, the Contact and E-Mail address provided must be a person who has the legal authority to contractually bind the offeror's company in a contract with the BCRSD.

Company Name: _____

Address: _____

Telephone: _____ Fax: _____

Federal Tax ID (or Social Security #): _____

Print Name: _____ Title: _____

Signature: _____ Date: _____

Contact Name and E-Mail Address:

NOTE: The offeror must clearly state in writing any restrictions or deviations from specifications and requirements stated herein. In the absence of such statement, the BCRSD will assume that all items/services offered are in strict compliance with specifications stated in the RFP, including all technical and cost requirements, terms and conditions. The vendor must agree that the proposal, if selected for award by the BCRSD, will be included as part of the final contract with the BCRSD.

Appendix B – Vendor Experience, Expertise & Reliability Questionnaire

(The offeror should complete and return this with the proposal)

The following information must be provided by the offeror to assist BCRSD in evaluating the offerors' experience, expertise and reliability. The BCRSD reserves the right to use this information, including information gained from any other source, in the evaluation process.

Failure to submit requested information may negatively impact the evaluation of the proposal. The BCRSD is under no obligation to obtain information from the vendor not submitted with the proposal that may impact the subjective evaluation of the vendor's proposal.

B.1 Company History:

The offeror should describe in the available space, or attach additional pages, with the company's background in the provision of information technology-related services, e.g., when the company was founded, how long the company has been serving the Missouri market, etc.:

B.2 Offeror's References:

Provide at least three (3) references for whom the offeror has performed IT-related service in the past three () years:

Reference 1

Company/Entity Name: _____

Contact Name: _____

Contact Title: _____

City: _____ State: _____

Telephone Number and Area Code: _____

E-mail Address: _____

Description of Equipment/Services Furnished: _____

Availability of Reference: _____

Reference 2

Company/Entity Name: _____

Contact Name: _____

Contact Title: _____

City: _____ State: _____

Telephone Number and Area Code: _____

E-mail Address: _____

Description of Equipment/Services Furnished: _____

Availability of Reference: _____

Reference 3

Company/Entity Name: _____

Contact Name: _____

Contact Title: _____

City: _____ State: _____

Telephone Number and Area Code: _____

E-mail Address: _____

Description of Equipment/Services Furnished: _____

Availability of Reference: _____

B.3 Personnel Expertise Summary

Expertise of **key personnel** who will be assigned tasks as defined herein will be considered in the subjective evaluation of proposals. The vendor should identify the names and provide a brief description of the background and work experience of key personnel who will be assigned to perform mowing services.

1) Name: _____
Title: _____
Background &
Experience: _____

2) Name: _____
Title: _____
Background &
Experience: _____

3) Name: _____
Title: _____
Background &
Experience: _____

B.4 Signature and Identity of Offeror

The undersigned states that the correct LEGAL NAME and ADDRESS of (1) the individual Offeror, (2) each partner or joint venture (whether individuals or corporations, and whether doing business under fictitious name), or (3) the corporation (with the state in which it is incorporated) are shown below; that (if not signing with binding intent to become the responsible and sole Contractor) the signing party is the agent of, and duly authorized in writing to sign for the Offeror or Offerors; and that the signatory is signing and executing this (as indicated in the proper spaces below) as the proposal of a:

() sole individual () partnership () joint venture

() corporation, incorporated under laws of the state
of _____

Dated _____, 20__

Name of individual, all partners, or joint ventures:

Address of each:

Doing business under the name of:

Address of principal place of business in
Missouri:

(If a corporation - show its name above)

ATTEST:

(Secretary)

(Title)

NOTE: If the Offeror is doing business under a FICTITIOUS NAME, the Proposal shall be executed in the legal name of the individual, partners, joint ventures, or corporation, with the legal address shown, and the REGISTRATION OF FICTITIOUS NAME filed with the Secretary of State, as required by Section 417.200 to 417.230, RS Mo. shall be attached. If the Offeror is a CORPORATION NOT ORGANIZED UNDER THE LAWS OF MISSOURI, it shall procure a CERTIFICATE OF AUTHORITY TO DO BUSINESS IN MISSOURI, as required by Section 351.570 and following, RS MO. A CERTIFIED COPY of such Registration of Fictitious Name or Certificate of Authority to do Business in Missouri shall be filed as requested by the BCRSD.

Appendix C – Statement of Qualifications

(The offeror should complete and return this with the proposal)

Name of Offeror: _____

Business Address: _____

When Organized: _____

When Incorporated: _____

Number of years in business: _____

If not under present firm name, list previous firm names and types of organizations.

Number of years engaged in business under present firm name: _____

If the offeror has done business under a different name, please give name and business location under that name: _____

Percent of work to be done by directly-employed staff: _____

Has the offeror ever failed to complete any work awarded to the offeror's company? Yes or No (Circle One)

If so, where and why? _____

Has the offeror ever defaulted on a contract or been in litigation for services performed? Yes or No (Circle One). If "Yes", give details:

(a) Number of contracts on which default was made: _____

(b) Description of defaulted contracts and reason therefore: _____

Dated at this _____ day of _____ 2025

Name of Organization(s) _____

By (Name and Title of person signing) _____

(Signature) _____

Appendix D – Work Authorization Information

(The offeror should complete and return this with the proposal)

INSTRUCTIONS FOR COMPLIANCE WITH HOUSE BILL 1549

House Bill 1549 addresses the Department of Homeland Security's and the Social Security Administration's E-Verify Program (Employment Eligibility Verification Program) that requires the BCRSD to verify "lawful presence" of individuals when we contract for work/service; verify that contractor has programs to verify lawful presence of their employees when contracts exceed \$5,000; and a requirement for OSHA safety training for public works projects.

The BCRSD is required to obtain certification that the offeror awarded the attached contract participates in a federal work authorization program. To obtain additional information on the Department of Homeland Security's E-Verify program, go to:

<https://www.e-verify.gov/employers>

Please complete and return form Work Authorization Certification Pursuant to 285.530 RS MO if the contract amount is in excess of \$5,000. Attach to this form the E-Verify Memorandum of Understanding that the offeror completed when enrolling. Information on that form is available at

www.e-verify.gov/sites/default/files/everify/memos/MOUforEVerifyEmployer.pdf

If the offeror is an Individual/Proprietorship, then the offeror must return the attached Certification of Individual Offeror. On that form, the offeror may do one of the three options listed. Be sure to attach any required information for those options as detailed on the Certification of Individual Offeror. If the offeror chooses option number two, then the offeror will also need to complete and return the attached form Affidavit.

(The offeror should complete and return with the proposal)

WORK AUTHORIZATION CERTIFICATION
PURSUANT TO 285.530 RS MO
(FOR ALL AGREEMENTS IN EXCESS OF \$5,000.00)

County of _____)
) ss
 State of _____)

My name is _____. I am an authorized agent of _____
 _____(Offeror). This business is enrolled and participates in a federal work authorization
 program for all employees working in connection with services provided to the BCRSD. This business
 does not knowingly employ any person that is an unauthorized alien in connection with the services
 being provided. Documentation of participation in a federal work authorization program is attached
 hereto.

Furthermore, all subcontractors working on this contract must affirmatively state in writing in their contracts that they are not in violation of Section 285.530.1, must not thereafter be in violation and submit a sworn affidavit under penalty of perjury that all employees are lawfully present in the United States.

Affiant

Date

Printed Name _____

Subscribed and sworn to before me this _____ day of _____, 20_____.

Notary Public

CERTIFICATION OF INDIVIDUAL OFFEROR

Pursuant to Section 208.009 RS MO, any person applying for or receiving any grant, contract, loan, retirement, welfare, health benefit, post-secondary education, scholarship, disability benefit, housing benefit or food assistance who is over 18 must verify their lawful presence in the United States. Please indicate compliance below. Note: A parent or guardian applying for a public benefit on behalf of a child who is citizen or permanent resident need not comply.

Options

_____1. I have provided a copy of documents showing citizenship or lawful presence in the United States. (Such proof may be a Missouri driver's license, U.S. passport, birth certificate, or immigration documents). Note: If the applicant is an alien, verification of lawful presence must occur prior to receiving public benefit.

_____2. I do not have the above documents but provide an affidavit (copy attached – see following page) which may allow for temporary 90-day qualification.

_____3. I have provided a completed application for a birth certificate pending in the State of _____. Qualification must terminate upon receipt of the birth certificate or determination that a birth certificate does not exist because I am not a United States citizen.

Applicant

Date

Printed Name

AFFIDAVIT
(Only Required for Certification of Individual Offeror (Option #2))
– see previous page –

State of Missouri)
) ss
County of _____)

I, the undersigned, being at least eighteen years of age, swear upon my oath that I am either a United States citizen or am classified by the United States government as being lawfully admitted for permanent residence.

Date

Signature

Social Security Number
or Other Federal I.D. Number

Printed Name

On the date above written _____ appeared before me and swore that the facts contained in the foregoing affidavit are true according to his/her best knowledge, information and belief.

Notary Public

My Commission Expires:

Appendix E – Current Technical Environment of BCRSD

- All information technology services are currently provided to BCRSD by Boone Electric Cooperative (BEC).
- BCRSD is connected to BEC by a fiber connection, delivering network access.
- E-mail and cloud services are hosted in Microsoft 365 by BEC
- Files are stored on a DFS-based file share hosted by BEC. Approximate data usage is 350GB
- Workstations are domain-joined to BEC domain, leveraging Group Policy Objects (GPO)
- The network is a single 48 port switch with a single access point. Wifi connections are not good
- Edge security is provided across the fiber connection to the BEC environment.
- Workstation security is provided by Windows Defender and Manage Engine
- Laptops access information remotely through VPN and Splashtop to get to network files
- There is 1 remote desktop connection used to connect to the Rocky Fork wastewater treatment plant.
- There is 1 standalone laptop used for CCTV
- There is 1 standalone laptop used to connect to SL rack
- No physical servers were present; access to billing server is provided by BEC
- There are approximately 20 users, with 9 onsite at the main building and 8 in the field, leveraging iPads and cell phones as needed
- Phone system is legacy POTS based, with auto-dialer system at treatment plants
- Various off-the-shelf applications in use including QuickBooks Online, Adobe Pro Suite
- There are some specialized applications including AutoCAD Civil3D, ArcGIS, BlueBeam, and iVue
- Web hosting is based on Wordpress
- Multi-Factor Authentication provided by DUO through BEC
- BCRSD is in the process of digitizing 30 years of paper records, which will eventually create a large volume of files to store, and increasing digital storage needs.
- Security cameras and door access is SW not Electric
- There is no collaboration platform in use, but Microsoft Teams is the desired platform.

EXISTING ENVIRONMENT SUMMARY/COUNTS	
*Based on input from BCRSD, BEC and discovery	
Servers	(0) *Billing server hosted by BEC
Workstations	Approx. (9) on-premise, (8) field, iPhones and iPads
Applications	AutoCad Civil3D, ArcGIS, BlueBeam, Adobe Pro Suite, Microsoft 365 suite, Quickbooks Online, SL Dog, iVue billing
Data/Files	Approximately 350GB stored on DFS file share
Email System	Microsoft 365 hosted by BEC
Web Hosting	WordPress
Printers	(3) - 1 Main, 1 check, 1 label
Phone System	Legacy POTS
Network	(1) 48 port switch and Access Points *Owned by BEC
Internet	Fiber through BEC – will need new connection

Appendix F – BCRSD Project Scope

1. Establish Microsoft 365/EntraID environment

- a. During this phase, cloud services and identity management will be established. New user accounts, groups, and other items created. This will be the foundation of the new environment.
 - i. Establish new 365/Entra ID Tenant
 - ii. Create user and group accounts for up to 20 users

2. Migrate e-mail from BEC to BCRSD

- a. During this phase, existing e-mail in mailboxes hosted by BEC will be synchronized to the new Microsoft 365 tenant mailboxes. User e-mail will continue to flow during the transition. At an agreed upon timeframe, e-mail routing will be switched to the new environment but still accessed by the legacy workstation profiles.
 - i. Configure DNS records with web provider
 - ii. Synchronize mailbox data
 - iii. Cutover e-mail
 - iv. Install Microsoft Office suite and register to BCRSD accounts
 - v. Assist users with reconfiguring Outlook for e-mail access

3. Migrate files to SharePoint

- a. During this phase, files will be moved (using a migration tool) from the existing file shares to the SharePoint environment. Once migrated, the old file shares will be disconnected to prevent file duplication. When this phase is completed, users will access files through SharePoint and OneDrive.
 - i. Deploy M365 backups (if purchased by BCRSD)
 - ii. Configure SharePoint sites/libraries
 - iii. Install and configure migration tool suite
 - iv. Stage and test file migration
 - v. Migrate file shares and have BEC disable access to original once confirmed

4. Configure and test machine policies for deployment and governance

- a. During this phase, Microsoft services such as Intune and AutoPilot will be configured and tested to apply policies, install applications automatically, and streamline new workstation deployment.
 - i. Provision Intune Auto Pilot for rapid deployment of applications, security settings, and policies
 - ii. Add existing devices to Intune
 - iii. Test and troubleshoot

5. Configure universal printing

- a. During this phase, the existing printers will be configured with a universal print system which will allow print services to be automatically deployed and managed centrally.
 - i. Configure and deploy universal print gateway device
 - ii. Configure universal print shares
 - iii. Create universal print deployment policy in Intune

6. Workstation and Profile migration

- a. During this phase, the existing workstations will be migrated from the BEC domain to EntraID for BCRSD. A profile migration tool will be used to retain profiles (My documents, Desktop Files, etc). Also, BEC will setup remote access to the billing software they will continue to host.
 - i. Migrate PCs to Azure Joined Machines
 - ii. Configure Profwiz Deployment Package
 - iii. Deploy and Execute Profwiz Migration
 - iv. Migrate User Profiles and Redirected Folders to OneDrive

7. Create Apple Business and federated logins and InTune management

- a. During this phase, Apple Business will be configured so that logins from Microsoft environment can be used on the iOS devices. Also, InTune management will be configured to control the iOS devices.
 - i. Provision Apple Business with Azure Federated login and Intune Management
 - ii. Create Apple Business tenant
 - iii. Add existing devices to Apple
 - iv. Connect Apple Business to Azure for Federated login
 - v. Connect Apple Certificates to Intune for Device Management
 - vi. Configure applications in Apple Business
 - vii. Configure applications in Intune
 - viii. Configure Apple device policies

8. Provision new network

- a. During this phase, a new physical network will be established including network switching, wireless connectivity, and a new Internet connection with firewall.
 - i. Firewall installation and configuration
 - ii. Ubiquiti cloud key deployment
 - iii. Wireless configuration
 - iv. Switch installation and configuration
 - v. Adopt devices and update firmware

- vi. Connect new Internet connection to firewall and test Internet access
- vii. Migrate machines to network

9. Migrate existing computers to the new BCRSD network

- a. During this phase, the existing computers will be fully migrated to the new network, physically moving their connections from the BEC network to the new BCRSD network. Post migration support will be provided.
 - i. Network Cutover
 - ii. Activate Teams
 - iii. Troubleshooting and post migration support
 - iv. Organize documentation
 - v. Close project

Out of Scope

The following items are **not** included in the migration plan. These may be items that were discussed as future projects or projects that will be delivered by 3rd parties:

- Migration of billing software (iVue). BEC will provide remote access to existing solution until BCRSD finds a suitable replacement
- Migration of website
- Migration of physical documentation that is being virtualized
- Replacing any computers, including CAD workstations. The migration plan is based on leveraging existing machines
- Migration or replacement of phone system (separate Teams based phone system or alternative VOIP system will be considered)
- Physical security system (door access and/or cameras)
- Troubleshooting any preexisting and/or unrelated issues
- Configuring automation of applications not compatible with Autopilot deployment
- Directory Management or Design within SharePoint
- Teams Customization
- Mounting of physical hardware above 9ft
- Low Voltage wiring

Assumptions and Risks

The following are key assumptions and risks based on the known environment and conditions

- Migration of billing software (iVue). BEC will provide remote access to existing solution until BCRSD finds a suitable replacement
- Users' desktop settings/preferences and browser data/cache may not transfer during profile migration
- End Users are responsible for any credentials for applications or web logins. BCRSD will retain or manage individual login information.
- Personal devices cannot be configured for Autopilot
- Factory installed Windows Pro licenses are required on any workstations. In place upgrade from Home to Pro is ineligible.
- Project management, such as scheduling, preparation, planning, coordination, communication, documentation, and design work, will be required during this project and shall be included as part of the up-front costs.
- Client must establish Microsoft 365 tenant with ADsync enabled and required licensing. *P1 Equivalent
- End-user devices must meet Azure/Intune system requirements.
- M365 backups will be required if data in Sharepoint requires more than 30 days.
- In cases where instructions are provided to users and it is agreed upon by the Project Team members and the Client Project Sponsors that the users will affect changes, it is expected that users will follow the instructions. Additional work created by a failure to follow instructions will be considered "Out of Scope"
- All existing hardware and infrastructure either directly or indirectly associated with this project is stable and capable of supporting the proposed changes. This includes having ample power capacity, proper cooling/HVAC, recent backups, solid network connectivity, up-to-date virus and malware protection with no active infections, and no failed hardware.
- Recurring fees such as cloud subscriptions, licensing, server management, security products, and online backup solutions may increase during and after the project to reflect the changes being made.
- Products purchased outside of the selected service provider will be subject to billable costs for handling, inventory management, order remediation and procurement charges.
- All existing hardware, software, services, and licenses either directly or indirectly associated with this project are covered under an active support contract/warranty maintained by the client. Any costs associated with contacting a vendor for third party support will be the responsibility of the client.

Needed Equipment/Licenses

The following equipment breakdown is an estimate based on preliminary discovery and conversations with BCRSD

Equipment and Licenses Needed	QTY
Microsoft M365 Business Premium per User	20
Microsoft M365 Backups per User	20
Firewall	1
Cloud Key	1
Wireless Access Point	3
Switch	1
Universal Print Connector, Annual Subscription	1
Uninterruptible Power Supply (UPS)	1
Wallmount Rack Cabinet	1
ForensIT ProfWiz Corporate Edition	1

Appendix G – Questions

Please provide responses to the questions below to the best of your ability.

1.0 Company Questions	
1.1	Q. Please provide your company webpage.
1.2	Q. What are the main products and services your company offers?
1.3	Q. Where are your company service centers located that are nearest to BCRSD?
1.4	Q. How many employees are in your company?
1.5	Q. How many employees in your company are responsible for account management?
1.6	Q. How many employees in your company provide technical support to customers?
1.7	Q. Has your company been involved in any notable acquisitions or mergers?
1.8	Q. Does your company have any key business partnerships with other industry leaders?
2.0 General Questions	
2.1	Q. Why do you believe that you are a good fit with our organization?
2.2	Q. Describe your onboarding/implementation process and approach if you were selected?
2.3	Q. How do you typically work with clients who have no in-house IT professionals?
2.4	Q. Is onsite support included?
2.5	Q. Do you provide 24-hour technical support?
2.6	Q. What services do you offer besides the core services of a Managed Service Provider?
2.7	Q. What type of general expertise can you provide in key technology areas?
2.8	Q. What are the most common events with additional billable hours that your clients see?

3.0 Process Questions

3.1	Q. Do you use in-house or contracted resources for services?
3.2	Q. Describe your process for onboarding BCRSD to your organization?
3.3	Q. What BCRSD resources would you require (i.e., information, data, staff resources, communication) during initial onboarding and on an ongoing basis?
3.4	Q. Describe your account management process, and how service requests are escalated.
3.5	Q. Where is/are your support center(s) located?
3.6	Q. How involved is your team with creating project plans/testing during technical projects?
3.7	Q. How do you notify users of maintenance windows, system outages and potential threats to the environment?

4.0 Technology Questions

3.1	Q. What types of monitoring agents would you use for end user devices?
3.2	Q. What is the backend help desk system you use?
3.3	Q. Do you offer managed firewalls or other managed technology?
3.4	Q. Do you offer MDM or other mobile management technology?
3.5	Q. Do you offer a SIEM or other security-based technology?
3.6	Q. Do you have tools to provide system uptime metrics?
3.7	Q. What tools do you use for network monitoring? Are you able to provide access to a BCRSD employee?
3.8	Q. List any additional tools/software not listed in answers above that will be offered in your solution/response.

Appendix H – General Contract Requirements

1.1 Invoicing and Payments:

- 1.1.1 The service provider shall invoice and be paid in accordance with firm, fixed prices shown in the Offeror Response within the proposal. The service provider shall submit an itemized invoice to the BCRSD monthly.
- 1.1.2. Payment will be made monthly after an invoice has been received.
- 1.1.3. Any additional costs associated with this proposal must be approved through the appropriate Change Order mechanism accomplished by way of a written contract amendment. No additional fees or taxes shall be included as additional charges. The BCRSD agrees to pay invoices within thirty (30) calendar days of receipt of a valid invoice.

1.2 Other General Contract Requirements:

- 1.2.1 Insurance Requirements: The service provider shall not commence work under the contract until the service provider has obtained all insurance required under this paragraph and the Certificate of Insurance has been approved by the BCRSD; nor shall the service provider allow any subcontractor to commence work on their subcontract until all similar insurance required of the subcontractor has been obtained and approved. All policies shall be in amounts, form and companies satisfactory to BCRSD which must carry an A-6 or better rating as listed in the A.M. Best or equivalent rating guide. Insurance limits indicated below may be lowered at the discretion of the BCRSD.
 - a. Employers Liability and Workers Compensation Insurance: The service provider shall take out and maintain during the life of the contract, **Employers Liability and Workers Compensation Insurance** for all of its employees employed at the site of work, and in case any work is sublet, the service provider shall require the subcontractor similarly to provide Workers Compensation Insurance for all of the latter's employees unless such employees are covered by the protection afforded by the service provider. Workers Compensation coverage shall meet Missouri statutory limits.
 - b. Commercial General Liability Insurance: The service provider shall take out and maintain during the life of the contract, such commercial general liability insurance as shall protect it and any subcontractor performing work covered by the contract, from claims for damages for personal injury including accidental death, as well as from claims for property damages, which may arise from operations under the contract, whether such operations be by themselves or for any subcontractor or by anyone directly or indirectly employed by them. The amounts of insurance shall be not less than \$3,448,710.00 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death. If providing

Commercial General Liability Insurance, then the Proof of Coverage of Insurance shall also be included.

- c. The service provider may satisfy the minimum liability limits required for Commercial General Liability or Business Auto Liability under an Umbrella or Excess Liability policy. There is no minimum per occurrence limit of liability under the umbrella or Excess Liability; however, the Annual Aggregate limit shall not be less than the highest "Each Occurrence" limit for either Commercial General Liability or Business Auto Liability. **The contractor shall agree to endorse the BCRSD as an Additional Insured on the umbrella or Excess Liability, unless the Certificate of Insurance state the Umbrella or Excess Liability provides coverage on a "Follow-Form" basis.**
- d. Business Automobile Liability: The service provider shall maintain during the life of the contract, automobile liability insurance in the amount of not less than \$3,448,710.00 combined single limit for any one occurrence, covering both bodily injury, including accidental death, and property damage, to protect themselves from any and all claims arising from the use of the Service Provider's own automobiles, teams and trucks; hired automobiles, teams and trucks; non-owned and both on and off the site of work.
- e. Subcontractors: The service provider shall cause each subcontractor to purchase and maintain insurance of the types and amounts specified herein. Limits of such coverage may be reduced only upon written agreement of BCRSD. The service provider shall provide to the BCRSD copies of certificates of insurance evidencing coverage for each subcontractor. The subcontractors' commercial general liability and business automobile liability insurance shall name the BCRSD as an Additional Insured and have the Waiver of Subrogation endorsements added.
- f. Proof of Carriage of Insurance: The service provider shall furnish the BCRSD with Certificate(s) of Insurance which name the BCRSD as an additional insured in an amount as required in the contract. The Certificate of Insurance shall provide that there will be no cancellation, non-renewal or reduction of coverage without thirty (30) calendar days prior written notice to the BCRSD. In addition, such insurance shall be on an occurrence basis and shall remain in effect until such time as the BCRSD has made final acceptance of the services provided.
 - a. Failure to maintain the required insurance in force may be cause for contract termination. In the event the Agency/Service fails to maintain and keep in force the required insurance or to obtain coverage from its subcontractors, the BCRSD shall have the right to cancel and terminate the contract without notice. The offeror shall add BCRSD as a Certificate Holder:

Certificate Holder address:

BCRSD
1314 North Seventh Street
Columbia, MO 65201

- 1.2.2 **Indemnity Agreement:** To the fullest extent permitted by law, the service provider shall indemnify, hold harmless and defend the BCRSD, its directors, trustees, officers, agents, and employees from and against all claims, damages, losses and expenses (including but not limited to attorney's fees) arising by reason of any act or failure to act, negligent or otherwise, of the service provider, of any subcontractor (meaning anyone, including but not limited to consultants having a contract with the service provider or a subcontract for part of the services), of anyone directly or indirectly employed by the service provider or by any subcontractor, or of anyone for whose acts the service provider or its subcontractor may be liable, in connection with providing these services. This provision does not, however, require the service provider to indemnify, hold harmless, or defend the BCRSD from its own negligence.
- a. Nothing in these requirements shall be construed as a waiver of any governmental immunity of the BCRSD, its officials nor any of its employees in the course of their official duties.
- 1.2.3 **Contract Terms and Conditions:** The contractor must be prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of this agreement or its rights, title or interest therein, or its power to execute such agreement to any other person, company or corporation without prior consent and approval in writing by the BCRSD.
- 1.3 Contract Period:** The initial contract period shall run from the **Date of Contract approval through December 31, 2028**. The contract will be extended for two years upon written notice provided by BCRSD to the service provider on or before December 31, 2028. Either party may terminate the contract by providing the other party with ninety (120) calendar days prior written notice.
- 1.4 Pricing:** All contract pricing shall be considered firm and fixed price for the entirety of the identified contract period.
- 1.5 Cancellation:**
- 1.5.1 The BCRSD reserves the right to cancel the contract without cause by giving not less than ninety (90) calendar days prior notice to the service provider in writing of the intention to cancel, or with cause, if at any time the contractor fails to fulfill or abide by any of the terms or conditions specified. Failure of the service provider to comply with any of the provisions of the contract may be considered a material breach of contract and may be cause for immediate termination of the contract at the discretion of the BCRSD. BCRSD may allow the service provider reasonable opportunity to cure material breach but is not required to do so.
- 1.5.2 **Fiscal Non-Funding Clause:** In the event sufficient budgeted funds are not available for a new fiscal period, the BCRSD must notify the provider of such occurrence and the contract must terminate on the last day of the current fiscal period without penalty or expense to the BCRSD.

- 1.6 Equal Opportunity Employer:** The BCRSD is an equal opportunity affirmative action employer pursuant to federal and state law, and all respondents submitting proposals shall be considered to be employers in compliance with federal and state laws, unless otherwise stipulated.
- 1.7 Work Authorization Certification:** If the total contract price is in excess of \$5,000, the contractor must complete the Work Authorization Certification form (See attached Work Authorization form). Before an award can be made, the serviced provider must supply proof of enrollment in the E-Verification program. (See attached Instructions for Compliance with House Bill 1549)
- 1.8 Sales/Use Tax Exemption:**
- 1.8.1** The BCRSD will provide the service provider with a completed Missouri Project Exemption and Missouri Tax Exemption letter for BCRSD. It shall be the responsibility of the service provider to ensure that the BCRSD pays no sales/use taxes from which it is exempt. The service provider shall also be responsible for retaining a copy of the project exemption certificate for a period of five years and for compliance with all other terms and conditions of section 144.062, RSMO, not otherwise herein specified. The service provider agrees not to use or permit others to use the project exemption certificate for taxable purchases of materials or rentals and supplies not directly incorporated into or used in the work to which it applies and agrees to indemnify and hold the BCRSD harmless from all losses, expenses and costs including litigation expenses and attorney fees resulting from the unauthorized use of such project exemption certificates.

Appendix I – BCRSD Standard Terms and Conditions

1. Contractor shall comply with all applicable federal, state, and local laws and failure to do so, in BCRSD's sole discretion, shall give BCRSD the right to terminate this Contract.
2. Responses shall include all foreseeable charges (unless otherwise specified) to BCRSD.
3. The BCRSD has the right to accept or reject any part or parts of all bids, to waive technicalities, and to accept the offer the BCRSD considers the most advantageous to the BCRSD. BCRSD reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the BCRSD. BCRSD reserves the right to reject any or all bids, may re-issue a request for proposals for the services described herein as determined to be in the best interest of the BCRSD in the sole discretion of BCRSD, to waive informalities or minor deficiencies contained in a bid, and to award a contract to other than the bidder submitting the lowest cost proposal.
4. The BCRSD reserves the right, when only one proposal has been received by the proposal closing date, to delay the opening of proposals to another date and time in order to revise specifications and/or establish further competition for the commodity or service required. The one (1) proposal received will be retained unopened until the new Closing date, or at request of the offeror, returned unopened for re-submittal at the new date and time of proposal closing.
5. Do not include Federal Excise Tax or Sales and Use Taxes in bid process, as law exempts the BCRSD from them.
6. The delivery date and project delivery schedule will be taken into consideration in awarding the proposal.
7. The BCRSD reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Offeror must notify the BCRSD.
8. In case of default by the Offeror, the BCRSD will procure the articles or services from other sources and hold the offeror responsible for any excess cost occasioned thereby.
9. Failure to deliver as guaranteed may disqualify the offeror from future bidding.
10. Prices must be as stated in units of quantity for all anticipated costs that are not one-time project development and onboarding costs. One time project development and onboarding costs should be clearly identified.
11. No bid transmitted by fax machine or e-mail will be accepted.
12. The BCRSD of Boone County, Missouri expressly denies responsibility for, or ownership of any item purchased until same is delivered to the BCRSD and is accepted by the BCRSD.
13. Should an audit of Offeror's invoices during the term of the Agreement, and any renewals thereof, indicate that the BCRSD has remitted payment on invoices that constitute an over-charging to the BCRSD above the pricing terms agreed to herein, the Offeror shall issue a refund check to the BCRSD for any over-charges within 30-days of being notified of the same.