



citycounty insurance services  
cisoregon.org

## Request for Proposals (RFP)

### Managed Service Provider

CIS  
15875 Boones Ferry Rd #1469  
Lake Oswego, OR 97035  
(503) 763-3800

<b>RFP Schedule</b>	
Issuance of RFP:	<b>September 14, 2022</b>
Submission of Questions about the RFP:	<b>September 28, 2022, 5:00 p.m. (PT)</b>
Proposal Due:	<b>October 12, 2022, 5:00 p.m. (PT)</b>
Anticipated Contract Award:	<b>December 2022</b>

**REQUEST FOR PROPOSALS  
FOR  
MANAGED SERVICE PROVIDER**

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## I. INTRODUCTION

### A. PURPOSE

The purpose of this Request for Proposals (RFP) is for CIS to receive proposals from qualified firms (Proposer or Provider, as appropriate) capable of providing CIS with exemplary managed service support in Information Technology and Information Security to meet CIS' needs. The selected Provider will enable CIS to maintain and improve its technology and security architectures and infrastructures, improve quality of service and user satisfaction, minimize support costs, and provide maximum return on any approved investments. The selected Provider will provide ongoing support and coordination of CIS' technology and security platforms, in some cases working with existing vendors who support or deliver such services, to ensure complete and appropriate implementations, general maintenance and required troubleshooting of the technology and security architectures.

### B. BACKGROUND

CIS (Citycounty Insurance Services) is a public entity that provides insurance and risk management services to Oregon cities and counties and other public entities created by these cities and counties. CIS was formed in 1981 by its parent organizations, the League of Oregon Cities and Association of Oregon Counties. Most cities and counties in Oregon participate in one or more CIS programs (property, liability, and health benefits). These participating entities are considered CIS members.

## II. SCOPE OF WORK

The selected Provider will provide a range of services in support of CIS' Information Technology and Information Security operations, including, but not limited to:

- On-Demand Local Support and 24x7 Remote Support
  - Onsite upon request in Wilsonville and Eugene offices and 24x7 remote help desk support for CIS staff
  - Proactive and predictive support services
- Initial architecture assessment
- Initial management report on information risk and audit preparedness
- Laptop and applications support
- Server and workstation administration services
  - Routine preventative maintenance services
  - Vendor liaison and management services
  - 24x7 operations monitoring
- Network administration services
- Backup management and testing

- Strategic planning and cost analysis
  - Recommendations concerning system improvements and cost savings
  - Technical support for future designs and purchases of equipment, software, and license agreements.
  - Procurement as a service
- Emergency operations plan

Additional details regarding CIS’ specific requirements for the services identified above are included in [Appendix B](#).

Overall, CIS maintains the following:

- Two physical locations. Our primary office is in Wilsonville, Oregon and we have a small satellite office in Eugene.
- Each office uses the same ISP with a firewall, and domain controller. All other servers and systems are in Azure.
- Deploys 17 servers (11 Windows, 6 Linux) / application systems to support CIS’ functional architecture
- CIS is structured into 8 departments
- We have approximately 67 end users
- Consuming ~ 125 end points (laptop / printer / wireless / etc.)
- Email services are provided by Microsoft 365 E3 licensing
- Internal communication and meetings are provided by Teams
- Telephony is provided by RingCentral, cloud services
- CIS intends for all systems to be up and running 24/7. However, maintenance is possible on a scheduled basis after 10:00 p.m. (PT) and before 6:00 a.m. (PT) on weekdays or most times on holidays and weekends.

### III. SCHEDULE AND SUBMITTAL

#### A. RFP AND EVALUATION SCHEDULE

Issuance of RFP:	<b>September 14, 2022</b>
Deadline to Submit Written Questions about the RFP:	<b>September 28, 2022, 5:00 p.m. (PT)</b>
Proposal Due Date:	<b>October 12, 2022, 5:00 p.m. (PT)</b>
Evaluation of Proposals, Finalists Selected:	<b>Week of October 17, 2022</b>
Finalist Interviews:	<b>Week of October 24, 2022</b>
Anticipated Contract Award:	<b>December 2022</b>
Commencement of Contract:	<b>January 1, 2023</b>

## B. CIS CONTACT PERSON

**Steve Norman**  
**Administrative Officer**  
Email: [snorman@cisoregon.org](mailto:snorman@cisoregon.org)  
Phone: 503-763-3890

## C. WRITTEN QUESTIONS

If proposers have questions about the RFP, they are encouraged to submit them as soon as possible, but no later than the **5:00 p.m. (PT) on September 28, 2022**. Questions must be in writing and may be e-mailed to the Contact Person above. CIS will not be obligated to answer any questions received after the deadline, or any questions submitted in a manner other than as instructed above.

## D. PROPOSAL SUBMITTAL

### 1. General

Proposals must be received by **5:00 p.m. (PT) on October 12, 2022**. Any proposal received after this date and time will not be considered.

Delivery of proposals by the specified deadline is the sole responsibility of the Proposer. CIS will not be responsible for, nor accept as a valid excuse, any delay the method of delivery used by the Proposer except where it can be established that CIS was the sole cause of the late receipt.

### 2. Method of Submittal

The proposal must be submitted in electronic form in an email to the [Contact Person](#) above.

### 3. Evaluation Criteria

All proposals received in accordance with these RFP instructions will be evaluated to determine if they are complete and meet the requirements specified in this RFP. An award will be made to the Proposer whose offer is judged to be the most advantageous to CIS, though CIS expressly reserves the right to reject all proposals and make no award under this RFP.

The following criteria will be considered in evaluating the proposals:

- Quality of the Proposal, including an expressed understanding of CIS' requirements;
- Qualifications;
- Experience, particularly with similar entities;
- Interviews;

- References;
- Local Staffing & Availability;
- Work Plan/Technical Approach;
- Cost Schedule;
- Miscellaneous, including exceptions/deviations

## **IV. GENERAL INSTRUCTIONS**

### **A. ORAL COMMUNICATIONS**

Any oral communication by CIS' [Contact Person](#) or designee concerning this RFP is not binding and shall in no way modify the RFP or the obligations of CIS, a proposer, or selected firm(s).

### **B. CHANGES TO RFP**

If it is necessary to make material changes to the RFP, CIS will e-mail written RFP addenda to all recipients of record of the original RFP and post such addenda on CIS' website ([www.cisoregon.org/About/RFS](http://www.cisoregon.org/About/RFS)). Recipients of record are those parties to whom CIS directly sent a copy of the RFP. Responses to written questions received by the specified deadline will be incorporated in an RFP addendum.

It is the responsibility of the proposer to inquire of CIS as to any addenda issued. This may be done by checking CIS' website prior to the proposal submittal deadline. All addenda issued shall become part of the RFP.

### **C. EXCEPTIONS / DEVIATIONS**

Any exceptions to or deviations from the requirements set forth in this RFP must be declared in a separate element of the submitted proposal under the heading "**Exceptions and Deviations**".

### **D. AUTHORIZATION TO DO BUSINESS**

Proposers must be authorized to do business in the State of Oregon and in the local jurisdiction in which they are located or where the work will be performed.

### **E. PRE-CONTRACTUAL EXPENSES**

CIS shall not be liable for pre-contractual expenses incurred by a proposer in the preparation of its proposal and proposers shall not include any such expenses in their offers. Pre-contractual expenses are defined as expenses incurred by the proposer to: (1) prepare and submit its proposal to CIS; (2) negotiate with CIS on any matters related to this RFP; and (3) any other expenses incurred by a proposer prior to the date of award, if any.

Issuance of this RFP and receipt of proposals does not commit CIS to award a contract. CIS reserves the right to postpone the award for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one proposer simultaneously, or to cancel all or part of this RFP.

#### **F. WITHDRAWAL; PROPOSAL IRREVOCABLE FOR 90 DAYS**

A proposer may withdraw its proposal at any time prior to the submittal deadline by sending CIS a request in writing from the same person who signed the submitted proposal. As of the deadline for submittal, any proposal received by CIS and not withdrawn becomes an irrevocable offer available for acceptance by CIS immediately and for **90 days** thereafter. Proposers are responsible for the accuracy of their proposals and no allowance will be made for errors or price increases that a proposer later alleges are retroactively applicable.

#### **G. DISPOSITION OF PROPOSALS**

All materials submitted in response to this RFP become the property of CIS, except for information identified by a proposer as being proprietary. A blanket statement that all contents of the proposal are proprietary will not be honored by CIS. Please note that as a public entity, CIS is subject to Oregon public records law, which may require the disclosure of information regarding proposals or a subsequent contract.

#### **H. IMMATERIAL DEFECTS IN PROPOSAL**

CIS may waive any immaterial deviation or defect in a proposal. CIS' waiver shall in no way modify the RFP documents or excuse a proposer from full compliance with the RFP if awarded the contract.

#### **I. WRITTEN AGREEMENT**

The proposer selected for contract award through this RFP shall be required to enter into a written agreement with CIS governing the provision of professional services to CIS, its members, and other eligible entities. The agreement will include pertinent terms and conditions set forth in this RFP and will reflect the proposer's offer or the outcome of contract negotiations. The agreement will also include, to the extent applicable, the provisions described in [Appendix A](#) and any terms or conditions added by addendum.

It is anticipated that the proposer may enter into separate agreements with subcontractors to fulfill the terms of this contract. CIS will not be a party to those separate agreements, nor in any fashion a guarantor or indemnitor of them.

## J. TERM OF CONTRACT

If a contract is awarded through this RFP, it will be effective upon full execution of the agreement, which CIS expects to be in **December 2022**. No agreement with CIS shall be in effect until a contract has been approved by the CIS Board of Trustees or designee and has been signed by both parties.

## K. NEWS RELEASES

News releases pertaining to any award resulting from this RFP may not be issued without the prior written approval of CIS.

## V. PROPOSAL FORMAT AND CONTENT

The proposal submitted in response to this RFP must contain the information required in Sections A through E below. Brevity is preferred. For the questions in Sections B through D, please precede your answers with a restatement of the question. If you intend to use any subcontractors in fulfillment of services, information should be furnished for both your firm and the subcontractors where appropriate.

Submitting general marketing materials about your firm in lieu of providing specific answers to questions will not be acceptable. If you wish to submit marketing materials, you should do so as a separate addendum rather than as part of the formal response.

## A. COVER LETTER

All proposals must include a cover letter addressed to the [Contact Person](#) in Section III, B above. At a minimum, the cover letter must contain the following:

- Identification of the proposer, including business name, address, and telephone number.
- Name, title, address, telephone number, and e-mail address of a contact person during the period of proposal evaluation.
- Acknowledgment of RFP addenda received, if any.
- A statement that the proposal shall remain valid for a period of not fewer than **go days** from the due date for proposals.
- Any exceptions to any specified criteria in this RFP.
- Identification of any information contained in the proposal which the proposer deems to be confidential or proprietary and wishes to be withheld from disclosure. A blanket statement that all contents of the proposal are confidential or proprietary will not be honored by CIS.

- Signature of a person authorized to bind the offering firm to the terms of the proposal.

## **B. QUALIFICATIONS, RELATED EXPERIENCE, AND REFERENCES**

1. Furnish background information about your firm, including date of founding, legal form (i.e., sole proprietorship, partnership, LLC, corporation/state of incorporation), number and location of offices, principal lines of business, number of employees, days/hours of operation and other pertinent data. Disclose any conditions (e.g., bankruptcy or other financial problems, pending litigation, planned office closures, impending merger) that may affect your ability to perform contractually. Certify that the firm is not debarred, suspended, or otherwise declared ineligible to contract by any federal, state, or local public agency.
2. Describe your firm's experience and qualifications for providing services.
3. Please provide references for whom you have provided services like those requested in the [Scope of Work](#).
4. Provide at least two case studies of providing the services like those requested in the [Scope of Work](#). Describe the services you offered and how they were beneficial to the client.

## **C. STAFFING AND PROJECT ORGANIZATION**

Identify the key personnel from your firm who would be assigned to this project and their specific roles in the project. Include a brief description of the number of years with your firm, qualifications, professional certifications, job functions, current caseload, and office location(s). Brief resumes (not more than two pages long) for all key personnel may be provided as an appendix, not in the body of the proposal.

## **D. WORK PLAN / TECHNICAL APPROACH**

1. Describe in detail the information, documents, staff assistance, facilities, or other resources you would require from CIS to complete your work; declare any critical assumptions upon which your work plan is based. For example, specify what documents you will need from CIS in order to begin your work.
2. Describe succinctly how your firm would accomplish the work and satisfy CIS' objectives included in this RFP.
3. Explain how you would approach providing the services described in the [Scope of Work](#) in general as well as to specific CIS members. Include the length of the engagement and the areas you would cover.

## **E. COST SCHEDULE**

The Proposer's cost schedule must be submitted with the proposal.

All costs are to be contained in this schedule. For each service element described in the Scope of Work, that the Proposer intends to provide, include either an hourly rate or fixed fee for the service, as appropriate. Include a description of any travel-related expenses that the Proposer expects to be reimbursed. Note that since CIS is a public entity, expenses may be subject to prior approval before they will be reimbursed.

This section must also include payment terms required for services rendered and a preferred schedule of billing dates.

The Proposer may include a separate list of optional services and corresponding hourly rates/fees in the cost schedule.

## **F. SAMPLE CONTRACT**

Submit a sample of your standard agreement for services with your response. Required provisions for the agreement are described in [Section IV\(I\)](#) above and [Appendix A](#) below.

## APPENDIX A – CIS CONTRACT CONSIDERATIONS

CIS contracts will be subject to the following standards. These are not exclusive and other contract clauses and provisions will obviously be applicable as well. However, these are areas respondents to CIS RFPs should be aware of in considering and preparing responses.

### A. MANDATORY PROVISIONS:

1. Indemnity Provision. There shall be no provision requiring CIS to indemnify contractor for contractor's acts or omissions. Indemnity provisions should be mutual and reciprocal. Our standard indemnity clause is as follows:

**Contractor agrees to hold harmless, indemnify, and defend CIS, and its officers and employee from and against all claims, suits, actions, losses, damages, liabilities, costs, and expenses of any nature resulting from, arising out of, or related to the acts or omissions of Contractor or its officers, employees, subcontractors, or agents in performance of services pursuant to this Contract. CIS agrees to hold harmless, indemnify, and defend Contractor and its officers and employees from and against all claims, suits, actions, losses, damages, liabilities, costs, and expenses of any nature resulting from, arising out of, or related to the acts or omissions of CIS or its officers, employees, subcontractors, or agents pursuant to this Contract.**

2. Independent Contractor Status. The following shall be included in CIS contracts:

**Contractor shall perform the required services as an independent contractor and not as an "officer, employee, or agent" of CIS as those terms are used in ORS 30.260 through 30.300. Although CIS reserves the right to evaluate the quality of the service provided by Contractor, CIS will not control the means or manner of Contractor's performance.**

3. Governing Law and Venue. CIS contracts shall subject to the laws of Oregon and venue for any disputes arising out of the contractual relationship. The contract shall include the following clause or the substantial equivalent:

**This contract shall be governed by the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding between CIS and Contractor arising from or related to this contract shall be brought and conducted in the Circuit Court of Marion County for the State of Oregon; provided, however, if a claim must be brought in a federal forum, then it shall be brought in the U.S. District Court for the State of Oregon.**

4. Insurance. Except under special circumstances, and with the approval and consent of CIS Executive Director, the following minimum insurance provisions shall be specified in the contract:

During the term of this Contract, Contractor shall maintain in force insurance coverage compliant with the requirements listed below:

- a. Workers' Compensation insurance in compliance with ORS Chapter 656 if Contractor employs "subject workers".
- b. Comprehensive General Liability insurance applicable to the services provided to CIS, with a combined single limit, or the equivalent, of not less than \$2,000,000 each occurrence for Bodily Injury, Personal Injury, and Property Damage, including contractual liability coverage applicable to the indemnity provided under this contract.
- c. Automobile Liability insurance applicable to the operation of Contractor's trucks or automobiles with a combined single limit of not less than \$1,000,000 each accident for Bodily Injury and Property Damage, including coverage for owned, non-owned, and hired vehicles, as applicable.
- d. Notice of Cancellation or Change. There shall be no cancellation, material change, or reduction of limits without 30 days' prior written notice from the Contractor or its insurer(s) to CIS.
- e. Certificates of Insurance. As evidence of the insurance coverages required by this contract, the Contractor shall provide acceptable insurance certificates to CIS as soon as practicable upon written request by CIS. If requested, complete copies of insurance policies, shall be provided to CIS.

#### **B. OTHER CONTRACT CONSIDERATIONS:**

1. Limitations on Liability and Warranties. Responses to RFP's should include a description of any limitations on liability to either CIS or purported third party liability limitations contractor would propose to include in a contract with CIS. These provisions are disfavored and will be a consideration in our review and comparison of RFP responses.
2. Termination. While termination provisions are negotiable, any provision that would not permit CIS to terminate the contract with a reasonable notice period, without further obligation, would be strongly disfavored and allowed only with the consent of the Executive Director. Our preferred termination provision is as follows:
  - a. **This Contract may be terminated at any time by mutual written consent of the Parties.**
  - b. **CIS may, at its sole discretion, terminate this Contract, in whole or in part, upon 30 days' written notice to Contractor. In the event of such a termination,**

CIS agrees to pay Contractor the fees and expenses reasonably incurred prior to such termination.

- c. CIS may terminate this Contract immediately upon notice to Contractor, or at such later date as CIS may establish in such notice, if Contractor commits any material breach or default of any covenant, warranty, obligation or agreement under this contract, or fails to perform in a timely manner the services under this contract, and such breach, default, or failure is not cured within 10 business days after delivery of CIS' notice, or such longer period as CIS may specify in such notice.
  - d. Contractor may terminate this Contract upon 10 days' written notice to CIS if CIS fails to pay Contractor pursuant to the terms of this Contract and CIS fails to cure within 30 days after receipt of Contractor's written notice, or such longer period as Contractor may specify in such notice.
3. Dispute Resolution. Mandatory arbitration provisions are disfavored. Our position is that alternative dispute resolution is encouraged, but arbitration should be undertaken only when both parties agree to it at the time of the dispute. If arbitration is undertaken, we would not consent to the rules and procedures of the American Arbitration Association. Other standard rules are available, or the parties can simply agree to rules and procedures as they deem appropriate. Provisions requiring mediation as a precedent to other legal action are acceptable.

## **APPENDIX B – CIS REQUIREMENTS**

Throughout the period of the awarded contract, the selected Provider is expected to provide exemplary service and support in all interactions with CIS. End user satisfaction will be one measure by which the health and vitality of the relationship will be judged. For context, specific activities expected are listed herein, but overall, the services and support expected must meet the highest standard. Root cause analysis and removal of potential issues is expected. The Provider will retain a registry of issues, their root causes and steps taken to ensure that once identified, all CIS systems will be corrected to prevent any recurrence of any given issue. For context, rapid resolution, and prevention of future occurrence of any issue is expected to meet the standard of exemplary service. Repeat or recurring issues will be one measure by which the health and vitality of the relationship will be judged.

In all cases, the Provider will operate under the premise of Simplify, Standardize, Secure and Efficient. Instabilities must be removed at the earliest possible opportunity, while a historical record of root cause and solution must be maintained. CIS expects the Provider to continue to simplify all operations through its daily maintenance, recommendations for new platforms and services, and interactions with CIS personnel. All platforms are expected to be maintained to a uniform standard, agreed upon between the Provider and CIS. All costs will be kept to a minimum, and continual reduction of cost through Simplified, Standardized and Secure systems will be one metric by which exemplary service will be measured.

### **A. On-Demand Local Support and 24x7 Remote Support**

The Provider will offer help desk support for CIS staff. When requested by CIS, the support will be provided in person and onsite at CIS' Wilsonville and Eugene offices. In-person support in other locations around Oregon may be requested from time to time. Help desk support that is not requested to be in-person may be provided remotely. The Provider will also offer proactive and predictive solutions for on-demand responses to CIS' IT requests. The Provider will be available during CIS' normal business hours. The Provider will be expected to perform maintenance service after hours and on weekends in situations which would least likely disrupt CIS personnel during regular business hours. All such activities will be carefully planned and approved by any potentially affected department in CIS prior to being performed. The Provider will ensure a maximum 15-minute acknowledgement and maximum two-hour response time for any situation deemed a critical or emergency issue by CIS leadership. The Provider will be expected to provide seamless integration to CIS personnel for support via on-site presence, phone, email, and portal to the Provider's service request system. The Provider will grant CIS full access to any such service request system containing CIS' records of service and support requests. The Provider will, in addition to critical or emergency issues as provided for above, provide for a tiered response patterned geared to serve the needs of CIS, balanced for responsiveness versus anticipated expense. The installations and necessary repair will be done wherever required by the Provider on site. CIS staff members are not to be considered as available to help troubleshoot and repair issues, and any hands-on work will solely be conducted by the Provider.

## **B. Initial Architecture Assessment**

The Provider will share a detailed written report within 45 days of commencement of the contract, and by January 15th of each year thereafter during the term of the contract, containing an analysis of CIS' functional architecture and infrastructure. The Provider shall meet with each CIS department to determine each department's unique technology needs. The written report will contain an analysis of all license agreements and an evaluation of equipment efficiency, life expectancy, capacity, speed, and current processes for all departments within CIS. The written report will also make recommendations to improve CIS' functional architecture and infrastructure to include licensing arrangements.

## **C. Initial Management Report on Information Risk and Audit Preparedness**

The Provider will share a detailed written report within 120 days of commencement of the contract, and by May 15th of each year thereafter during the term of the contract, containing an analysis of CIS' security architecture and calling to CIS leadership's attention any identified items that must be addressed to support CIS' obligations under HIPAA and general fiduciary responsibility to the common good.

## **D. Laptop and Applications Support**

The Provider will perform basic support functions, including installing laptops, mobile phone support, network printers, and standalone printers as well as other computer peripherals and office automated software. The Provider will diagnose and correct application problems, configure all computers for standard applications, and identify and correct end user hardware problems. The installations and necessary repair will be done wherever required by the Provider on site. CIS staff members are not to be considered as available to help troubleshoot and repair issues, and any hands-on work will solely be conducted by the Provider. The Provider will create, update, and maintain an inventory of all computer-related hardware and software and make the same available to CIS leadership upon request.

## **E. Server and Workstation Administration Services**

The Provider will manage CIS' computer network and associated hardware, software, and communications, services, and operating systems necessary for the quality, security, performance, availability, recoverability, and reliability of the system. The Provider will monitor server performance and capacity management services. The Provider will ensure scheduled preventive maintenance for equipment is promptly performed at non-disruptive times wherever possible and develop back-up plans and procedural documentation. The Provider will be responsible for configuration management, including changes, OS upgrades, and patches. The Provider will represent CIS faithfully in ensuring all vendor-related activities in support of CIS' mission associated with any facet of technology or security are likewise logged, maintained, and documented. The management of user logins and password security will be maintained, monitored, enforced and all associated actions documented. The Provider will support all software products relating to servers and workstations irrespective of additional vendor-

supported requirements. The installations and necessary repair will be done wherever required by the Provider on site. CIS staff members are not to be considered as available to help troubleshoot and repair issues, and any hands-on work will solely be conducted by the Provider.

#### **F. Network Administration Services**

The Provider will maintain and support network equipment, including the local area public/private wireless, switches, firewalls, routers, and other security devices as required. Coordination with CIS' ISP providers is also required.

Additionally, the installation, monitoring, and maintenance of all CIS assets is mandatory (i.e., printers, scanners, network devices, backup, WAN, LAN, VOIP phone system, web sites, and any other computer peripherals or devices). The Provider shall analyze routine configuration changes and install software patches and upgrades. The Provider shall design alert notifications to designated CIS personnel in the event of application, system, network, services, or data failure. Complete proactive monitoring of network equipment, including bandwidth utilization, and other performance indicators, with reporting when specified thresholds are reached is required. The Provider shall provide network performance and capacity management services, and network troubleshooting as well as maintain network documentation and procedures. The installations and necessary repair will be done wherever required by the Provider on site. CIS staff members are not to be considered as available to help troubleshoot and repair issues, and any hands-on work will solely be conducted by the Provider.

#### **G. Backup Management and Testing**

The Provider will ensure that all CIS servers and laptops are protected by EDR software, and that adequate firewall(s) are in place to prevent unwanted intrusion into CIS' computer network system and / or digital assets. The Provider will implement such systems designed to notify CIS leadership when system security protocols are compromised. The Provider will notify CIS leadership immediately of suspected breach of security or detection of an intrusion. A backup system will be established and maintained to prevent loss of data and functionality. The Provider will configure CIS' systems to comply with their Cybersecurity policy required for cyber coverage. The installations and necessary repair will be done wherever required by the Provider on site. CIS staff members are not to be considered as available to help troubleshoot and repair issues, and any hands-on work will solely be conducted by the Provider.

#### **H. Strategic Planning and Cost Analysis**

The Provider will lead the engineering, planning, and design phases for major system enhancements and implementations, including installations and upgrades of new and existing systems. The Provider will make recommendations for future purchases of technology and investments in security aligned specifically to CIS' needs. The Provider will lead and ensure proper installation and configuration of any new or major enhancement of systems.

The Provider will maintain all records for any costs associated with the contract and provide a detailed report monthly. This report will be delineated in such a fashion as to easily discern which

costs are associated to which departments under specific categories including but not limited to user system, core infrastructure, core architecture, approved improvements / changes.

The Provider will use such detail to support CIS' summary annual budget planning process ensuring that such information properly ties to the following year's cost allocation planning and strategic technology initiatives.

#### **I. Emergency Operations Plan**

The Provider shall produce and maintain an Operations Plan which meets all needs expressed within this RFP. The Operations Plan shall have two sections. The first section shall deal with standard business operations, including detail on appropriate Points of Contact, agreed Service Levels, appropriately aligned response categories based on impact to CIS' mission, service windows for required maintenance and overall communications requirements.

The second section shall detail the Provider's response and plan on supporting CIS' mission critical systems during a state or county-declared emergency. The Provider will be required to support such critical systems as designated by CIS on-site and through direct means. Such Business Continuity is an essential facet of the exemplary performance expected of the selected Provider.