



Request for Proposals

PREPARED BY:

Regional Income Tax Agency
10107 Brecksville Road, Brecksville, OH 44141

PROJECT TITLE:

Remote Access, Web Endpoint Protection and Multifactor Authentication
Upgrade

ISSUED DATE:

March 25, 2022

RESPONSES DUE DATE:

10:00 a.m. E.S.T., April 6, 2022

**REGIONAL INCOME TAX AGENCY
Request for Proposal**

Remote Access, Web Endpoint Protection and Multifactor Authentication Upgrade

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Letter from the Executive Director

March 25, 2022

The Regional Income Tax Agency (RITA, the Agency) is seeking proposals for professional services to upgrade the software for its remote access, web endpoint protection and multifactor authentication technology.

Proposals are to be submitted electronically to rfp@ritaohio.com no later than 10:00 a.m. E.S.T., April 6, 2022.

If your firm is interested in submitting a proposal, please execute the attached Mutual Non-Disclosure Agreement and return to Bob Kelley, IT Operations Manager, at rfp@ritaohio.com.

Potential vendors may direct questions or requests for clarification to Mr. Kelley at rfp@ritaohio.com through 10:00a.m. E.S.T. on April 1, 2022. A copy of the questions and requests received, along with RITA's responses, will be provided to each party that has executed a Non-Disclosure Agreement, without identifying the source of the question or request. To the extent possible, you are asked to compile your questions and requests and submit them all at one time.

Please be aware that the Agency reserves the right to reject any and all proposals, or any part of any proposal, or to waive informalities or defects in proposals, as the Board of Trustees of the Agency deems to be in the best interest of the Agency.

Cordially,

Donald W. Smith
Executive Director

RFP Introduction

The Regional Income Tax Agency (RITA, the Agency) is a governmental entity established to administer and collect local income taxes for political subdivisions. As an agent for its municipalities, RITA provides substantial financial services to its members. Municipal income tax is collected from individuals and/or employers withholding on salaries, wages, commissions, fees and other forms of compensation. The tax is also collected from business entities based on net profits.

As of 2021 there are over 390 taxing jurisdictions in 78 counties served by the Agency (just over 50% of all taxing jurisdictions in Ohio with an income tax) and total annual tax collections are over \$1.5 billion.

RITA is soliciting proposals for professional services from qualified vendors to install and test software upgrades to the technology it uses for remote access, web endpoint protection and multifactor authentication. We are seeking vendors with expert level engineers on staff to work alongside RITA and another 3rd party vendor to upgrade the software running on this technology.

RITA intends to award a contract to the most responsive and responsible vendor as soon as practical after the opening of the proposals. The vendor to whom the award is made shall enter into a written contract in a form acceptable to RITA within ten (10) days of notification of award. The project will start no earlier than April 19, 2022.

The Regional Income Tax Agency is not responsible for any costs incurred by the respondent in preparation of a proposal. RITA reserves the right to negotiate with vendors submitting quotes in order to obtain the most favorable terms, conditions and pricing for the Agency as determined by the Agency in its sole discretion. Also, as deemed in the best interest of the Agency by the Board of Trustees, RITA reserves the right to reject any or all parts of the quotes.

Proposal Requirements

Proposals must be submitted in the format and order outlined below. All proposals should present all information in a concise manner, neatly arranged, legible, and in terms understandable for evaluation. All information requested is to be addressed directly and completely.

It is more desirable to give additional information than less when the answer could be misinterpreted. There should be no attachments, enclosures, or exhibits other than those considered by the proposer to be essential to a complete understanding of the proposal submitted.

Section I – Qualifications & Experience

1. Describe your firm's experience in completing upgrades to the technology outlined in this RFP. Include in your response the number of upgrade projects, similar to this one, that are performed by your firm annually.
2. Provide a list of customers/references that would be similar in size or industry to our account where your firm has completed similar projects.
3. Provide a brief resume and/or bio along with the years of experience that the resource(s), who will be assigned to the project, has in designing, implementing and upgrading the technology products referenced in this RFP.

Section II – Implementation and Testing

- 1) Provide the software versions you are recommending for the upgrade and the reasoning behind the recommendation.
- 2) Provide a pricing sheet that contains the following information.
 - a. The number of man hours by skill set (if more than one) that are required to complete the upgrade and an explanation of why each skill is required for the project.
 - b. List any costs outside of the required resource hours as separate line items with an explanation.
 - c. All pricing provided must be valid for 60 days.
- 3) Provide a project plan that contains the following.
 - a. The estimated start date of the project upon your firm and RITA signing the project contract.
 - b. A list of assumptions and responsibilities for both your firm and RITA.
 - c. A timeline with tasks that accurately depicts how the upgrade will be executed. The plan should be accurate enough that only the starting date of the project needs to be changed upon an agreed to start date.
 - d. An explanation on how the project will be successfully executed to reduce any production downtime.
- 4) Provide a test plan that contains the following.
 - a. A list of assumptions and responsibilities for testing.
 - b. An explanation of the steps of the plan that you will execute to ensure the upgrade is successful with minimal impact to production.

Proposal Instructions

All proposals must be submitted in the format and order outlined in the Proposal Requirements section and submitted electronically to RFQ@ritaohio.com.

All proposals must be received by the Executive Director, Regional Income Tax Agency, by 10:00 a.m. E.S.T., April 6, 2022. All Proposals shall be emailed to RFP@ritaohio.com.

It is RITA's intention to enter into a contract as soon as practical after the proposals are evaluated and Board approval is received. The successful vendor shall enter into a contract with the Regional Income Tax Agency within ten days of the notification of award or as soon as practical thereafter as determined by RITA. Implementation work is expected to begin no earlier than April 25, 2022.

Proposals will be evaluated on several factors including the degree of fit to the requirements and cost.

The Agency reserves the right to reject any and all proposals, or any part of any proposal, or to waive informalities or defects in proposals, as the Board of Trustees of the Agency shall deem to be in the best interest of the Agency. By submitting a proposal, each respondent is insuring that complete confidentiality of all Agency information will be maintained by all vendor personnel.

By submitting a proposal, each respondent is insuring that the vendor is an Equal Opportunity Employer and that their employees and applicants for employment are not discriminated against because of their race, color, religion, national origin, disability, age, genetic information, military status or sexual orientation. By signing a contract with RITA, the successful vendor guarantees that they comply, or will comply with the above provision and all other applicable state and federal laws regarding public contract work, and agrees to indemnify and hold the Regional Income Tax Agency harmless from any claims or damages incurred against or by the Regional Income Tax Agency resulting from any non-compliance by the successful vendor.

By submitting a proposal, each respondent is declaring that they are not in arrears to RITA for municipal income taxes or any other obligation to the Agency.