



REQUEST FOR INFORMATION

IT Service Management Solution

May 20, 2011

Response Due Date: **June 03, 2011**
and Time: **3:00 p.m. (Eastern Time)**

RFI Number: **2011-10-580-RFI**
Mailing Address: P.O. Box 4000
Ashburn, VA 20146

Delivery Address: Administrative Services Facility
44865 Loudoun Water Way
Ashburn, VA 20147

Procurement Contact: Bessie Nelson, Purchasing Technician
Phone: 571.291.7700
Fax: 571-223.2513
E-mail: bnelson@loudounwater.org

IF YOU NEED ANY REASONABLE ACCOMMODATION FOR ANY TYPE OF DISABILITY IN ORDER TO PARTICIPATE IN THIS PROCUREMENT, PLEASE CONTACT PURCHASING AS SOON AS POSSIBLE.

PM initials _____

TABLE OF CONTENTS

| <u>SECTION/TITLE</u> | <u>PAGE</u> |
|--|-------------|
| 1. PURPOSE..... | 1 |
| 2. BACKGROUND INFORMATION | 1 |
| 3. STATEMENT OF NEEDS..... | 2 |
| 4. RFI RESPONSE REQUIREMENTS | 2 |
| 5. SYSTEM DEMONSTRATIONS | 3 |
| 6. INSTRUCTIONS FOR PREPARING AND SUBMITTING RFI RESPONSE..... | 4 |
| ATTACHMENT A: BUSINESS FUNCTIONS..... | 6 |

1. PURPOSE

The intent of this Request for Information (RFI) is to obtain information from firms specializing in comprehensive, commercial-off-the-shelf (COTS), Service Management Solutions that incorporates an Incident Tracking System, Change Management and Knowledge Management for Loudoun Water's Information Technology Services (ITS) department. Firms shall include, in their RFI response, a brief overview of the relevant products and services available through their firm or in subcontracting/partnering arrangement with other firms. However proposed, Loudoun Water's expectation is a single point of contact (SPOC), for a COTS software solution, including installation, configuration and training services, and associated materials necessary for the implementation of a comprehensive Service Management Solution.

Loudoun Water will review the RFI submissions in order to issue a formal Request for Proposal (RFP). This RFI and information submitted by firms will not be binding but will be crucial in assisting Loudoun Water in defining system requirements and the procurement process. This is not an Invitation for Bid or a Request for Proposal; no contracts will result from the submission of this data, therefore, no contractual language is contained herein nor is it required in the RFI response.

2. BACKGROUND INFORMATION

- A. The Loudoun County Sanitation Authority (doing business and hereafter referred to as "**Loudoun Water**") is a public body politic and corporate and an instrumentality of the Commonwealth of Virginia, organized under the Virginia Water and Waste Authorities Act, being Chapter 28, Title 15.1, Code of Virginia of 1950, as amended (the "Act"). Loudoun Water was created by action of the Board of Supervisors of Loudoun County, Virginia and was chartered by the State Corporation Commission on May 27, 1959. As an Authority, Loudoun Water receives revenue from user fees, makes no profit, and our operations and finances are independent of the County's tax-supported services.
- B. Loudoun Water is located in Northern Virginia, about 25 miles west of Washington, DC. Loudoun Water has approximately 200 employees. Loudoun Water has approximately 60,000 connections serving more than 186,000 people. The customer base is expected to grow by an estimated 2,000 connections per year for the foreseeable future. Increased growth has resulted in greater service demands and changes in the size and complexity of Loudoun Water.
- C. Loudoun Water's Division of Information Technology Services (ITS) currently supports the IT software and hardware needs of approximately 200 employees with an average of 10 work orders per day.

3. STATEMENT OF NEEDS

Currently, the ITS department utilizes a work order system that has been in place for approximately seven years. This application is used for the submission and tracking of user IT hardware and software requests and incidents, as well as tracking minor IT assets. Change Management and Knowledge Management are not part of the current system.

Loudoun Water is seeking a solution that provides a cohesive, integrated solution for IT Service Management, Change Management and Knowledge Management. This comprehensive solution should allow for 15-20 technician queues, a minimum of 15 team and generic queues, and a minimum of 25 concurrent web end-users (customers).

4. RFI RESPONSE REQUIREMENTS

A. Qualifications and Brief History of Vendor

Firms shall provide a brief background and history of their firm specifically related to the Statement of Needs contained within this RFI. Firms shall include the specialized experience and technical competence of all proposed personnel and their company within this section; their response shall include a brief but detailed overview of the firm's expertise, qualifications and experience relative to this RFI's Understanding of Needs.

B. Product Summary

Firms shall provide a summary of the key features and functionality of their product.

C. Attachment A: Business Functions

Firms shall complete the attached functionality checklist and include it with the RFI response.

D. Subcontractors/Partners

Firms shall include a list of all subcontractors and/or partners with their RFI response. Responses to this RFI shall also include a statement of the subcontractors'/partners' qualifications, including current processes and procedures relative in having a single point of contact (SPOC).

E. References

Firms shall furnish a customer reference list with their RFI response, demonstrating at least four (4) customers presently using the proposed software system. If not a single solution provider, these customer references shall include subcontractor/partner arrangements similar in function and character to Loudoun Water. This reference list shall include the name and position of the customer

contact, telephone and facsimile number, e-mail address of contact person, full customer address, and the installation date of the software system or, approximate time since the system was installed.

F. Project Management Plan/Project Management

Loudoun Water will require a Project Management Plan and a qualified Project Manager for implementation of the software system including: design, configuration, delivery, installation, services and maintenance. Firms may provide some basic information relative to the RFI response, but more in-depth response will be expected only with a formal RFP response.

G. Training

Loudoun Water will require on-site training. Firms may provide some basic information relative to the RFI response, but more in-depth response will be expected only with a formal RFP response.

H. Maintenance Agreement

Firms may provide some basic information relative to this section with the RFI response, but a more in-depth response will be expected only with a formal RFP response.

I. System Enhancements, Upgrades, and Technology Roadmap

Firms may provide some basic information relative to this section with the RFI response, but a more in-depth response will be expected only with a formal RFP response.

5. SYSTEM DEMONSTRATIONS

Loudoun Water may request, at its sole discretion, an on-site system demonstration from one or more firms based on the information received as a result of this RFI. Firms will demonstrate some basic characteristics of a proposed system that might better assist Loudoun Water in determining and educating themselves as to the range of details to ask for in modules, the type of modules to request in an RFP, and the basic features included in the most up-to-date systems of the type being sought by Loudoun Water. In addition, there may be an open question and answer session. Firms are advised that in the event they submit a formal proposal in response to an RFP, they may be required to do an on-site demonstration specifically related to the RFP requirements again before a full evaluation committee

Loudoun Water will not be responsible for any expenses incurred in preparing and submitting responses or demonstrations.

6. INSTRUCTIONS FOR PREPARING AND SUBMITTING RFI RESPONSE

Questions and Inquiries

Questions and inquiries, both verbal and written, regarding this RFI must be directed to Bessie Nelson, Loudoun Water Purchasing Technician, at 571-291-7948 or bnelson@loudounwater.org.

Contents of Responses

The Firm's response shall address sections A through I in Section 4 above, "RFI Response Requirements". A cover letter, if included, shall be no more than one page.

Packaging of Responses

Each firm shall submit one (1) original response and seven (7) copies, as well as an electronic copy in PDF format on a CD, of their response Loudoun Water's Purchasing Division as indicated on the cover sheet of this Request for Information. The original response shall be clearly marked.

Delivery of Responses

- A. Responses may either be mailed to Loudoun Water, P.O. Box 4000, Ashburn, Virginia, 20146 or hand delivered or shipped to 44865 Loudoun Water Way, Ashburn, Virginia, 20147. They may not be emailed.
- B. Responses must be received by Loudoun Water's Purchasing Department before **June 03, 2011, 3:00 p.m. (Eastern Time)** deadline. Requests for extensions of this time and date will not be granted. Firms mailing their Responses shall allow for normal mail time to ensure receipt of their Responses by Loudoun Water's Purchasing Department prior to the time and date fixed for acceptance of the Responses. Responses or unsolicited amendments to Responses received by Loudoun Water after the acceptance date will not be considered. Responses will be publicly accepted and logged in at the time and date specified above.

Late Responses

Late Responses will be returned to the Firm unopened, if RFI number, acceptance date and Firm's return address is shown on the container.

Proprietary Information

Trade secrets or proprietary information submitted by a firm in connection with this RFI solicitation shall not be subject to disclosure under the Virginia Freedom of Information Act; however, the firm must invoke the protections of this section prior to or upon submission of the data or other materials, and must clearly identify the data or other materials to be protected and state the reasons why protection is necessary.

**IT Service Management Solution
RFI 2011-10-580-RFI**

Company _____

Address _____

Contact Person _____ Title _____

Telephone No. _____ Fax No. _____

Email _____

In compliance with this Request for Information, the undersigned offers their response as contained herein.

Signature _____ Date _____

Name (Printed) _____ Title _____

Attachment A: BUSINESS FUNCTIONS

Business Functions:

Firms should complete the tables in this section as follows by providing an "X" in the appropriate category:

- Y** – System meets the requirements as outlined without any additional modifications
- M** - System is capable of meeting the requirement with system modifications required
- N** - System is not capable of meeting the requirement
- S/P** System functionality is a subcontractor/partner arrangement
- Comment** – Any additional information

| Business Function Checklist | | | | | | |
|------------------------------------|--|----------|----------|----------|------------|----------------------------|
| Vendor Name: | | | | | | |
| | Business Functions | Y | M | N | S/P | Additional Comments |
| Work Order System: | | | | | | |
| | Tracking of Hours/Costs | | | | | |
| | Supports Document Attachments | | | | | |
| | Provides Single-Screen Interface | | | | | |
| | Customizable Work Order Fields | | | | | |
| | Creation of Recurring Work Orders | | | | | |
| | Definable Queues | | | | | |
| | Supports Parent/Child Work Order Relationships | | | | | |
| | Provides Customizable Work Order Templates | | | | | |
| | Provides Knowledge Base | | | | | |
| | Supports Service Level Agreements (SLAs) | | | | | |
| | Supports Escalation Workflow Processes | | | | | |
| | Technician Email Notifications | | | | | |
| | Flexible Customizable Permissions | | | | | |
| | Flexible Search Function | | | | | |
| | Import/Export Search Capability | | | | | |

| | Business Functions | Y | M | N | S/P | Additional Comments |
|--------------------------------|--|----------|----------|----------|------------|----------------------------|
| | Standard, Out-of-Box Reports | | | | | |
| | Customizable Reports | | | | | |
| | Dashboard Capability with Customizable Views | | | | | |
| | Integration/Synchronization with Active Directory | | | | | |
| | Supports Virtualization | | | | | |
| | Provides Web Interface | | | | | |
| Change Management: | | | | | | |
| | Integration with Work Orders | | | | | |
| | Ability to Change Status with Exceptions | | | | | |
| | Supports Tracking of IT Assets | | | | | |
| | Supports Document Attachments | | | | | |
| | Definable Change Types | | | | | |
| | Change Approval Workflow Process | | | | | |
| | Customizable Reports | | | | | |
| Incident Management: | | | | | | |
| | Supports Tracking of Time/Resources | | | | | |
| | Supports Workflow Processes | | | | | |
| | Customizable Reports | | | | | |
| | Ability to track period of incidents through to resolution | | | | | |
| Information Technology: | | | | | | |
| | Compatible with MS SQL Server 2005 or 2008 | | | | | |
| | IIS 7 Compatible | | | | | |
| | Supports Windows Server 2008, R2 Hosting | | | | | |
| | ITIL Compliance | | | | | |
| | Client Supported on IE 8 or Higher | | | | | |
| | Supports Virtualization | | | | | |