



City of Richmond

Request for Expressions of Interest 3805EOI Consulting Services - Microsoft Productivity Specialist

1. Introduction

1.1. The City of Richmond invites Expressions of Interest ("EOI") from interested parties to provide consulting services for maintenance and development of Word templates and macros for Microsoft Office Word Versions 2000, 2007, 2010.

2. Background

2.1. The City of Richmond has a customized Microsoft Word 2000 template and macro system comprised of 1000+ templates and macros, integrated with a staff database, Hummingbird/OpenText DM and other City enterprise applications. The template and macro system provides automated document production and enhanced productivity to 1600+ staff across multiple City departments and locations. The current macros and templates require maintenance and support and it is the City's intention to convert the current macros and templates to a 2007 or 2010 Word version within the next 12 months.

3. Scope

3.1. Onsite consulting services are required for a minimum of three (3) days per week (and additional days as necessary) for the duration of the contract. Services include but are not limited to:

3.1.1. Maintaining the existing template and macro system in Microsoft Word 2000, including integration with a SQL database containing staff names and other attributes, Hummingbird/OpenText DM and Microsoft Access;

3.1.2. Developing new templates and macros that will integrate into the existing Microsoft Word 2000 system;

3.1.3. Providing Microsoft Office features, productivity, troubleshooting and technical support to IT support staff and other City staff;

- 3.1.4. Mentoring City staff to apply best practices in the maintenance of departmental templates;
- 3.1.5. Upgrading the existing Microsoft Word template and macro system to Microsoft Office Word 2007, including:
 - 3.1.5.1. Gathering requirements from IT support staff and City staff;
 - 3.1.5.2. Converting templates and macros, enhancing them to take advantage of new features;
 - 3.1.5.3. Developing customized ribbons and toolbars;
 - 3.1.5.4. Transitioning the staff database from Microsoft SQL to Oracle;
 - 3.1.5.5. Testing templates and macros prior to deployment;
 - 3.1.5.6. Assisting with Microsoft Office configuration;
 - 3.1.5.7. Assisting in developing staff training plans and deliver training as required;
 - 3.1.5.8. Participating in staff engagement, including leading and/or presenting at Microsoft Office user group meetings;
 - 3.1.5.9. Developing documentation as required;
- 3.1.6. Providing current technical information and knowledge on Microsoft Office 2010.

4. Requests for Proposals

- 4.1. Proponents may be invited to submit proposals, if required, to a Request for Proposals (“RFP”) from the City of Richmond.

5. Qualification Criteria

- 5.1. The successful Proponent shall have previously provided services in a similar size and type of organization. Experience in municipal government is preferred. The successful Proponent shall have previously worked with a similar size and complex template and macro system, integrated with a database containing staff names and other attributes, Hummingbird/OpenText DM and Microsoft Access databases. The successful Proponent shall have

previously provided services in a legal environment, specifically real estate/property.

6. Submission Details

6.1. Proponents are requested to submit three (3) copies of their Expression of Interest marked "EOI 3805 - Microsoft Productivity Specialist" to the Purchasing Division, Information Counter, Main Floor, Richmond City Hall located at 6911 No. 3 Road, Richmond, BC V6Y 2C1. Submissions will be received on or before:

12:00 Noon, local time, on February 22, 2010

6.2. Submissions will be evaluated at the discretion of the City based upon the information contained in the submissions. Questions relating to this EOI may be directed to Sumita Dosanjh, Buyer II - Contracting Specialist by email to purchasing@richmond.ca. Inquires and responses relating to the EOI will be posted on BC Bid and the City's website. It is the sole responsibility of each Proponent to check these sites on a regular basis for amendments, addendums, or questions related to this EOI.

6.3. Note: Any submission will not necessarily be accepted. Proponents are advised they have no claim for compensation in the preparation of their submissions and that by submitting an EOI, each Proponent shall be deemed to have agreed that it has no claim. All submissions received by the City shall be subject to the Freedom of Information & Protection of Privacy Act (BC).

7. Format Requirements

7.1. All proponents are required to provide the following information with their submissions, and in the order that follows:

7.1.1. A Corporate profile of their firm outlining its history, philosophy and target market.

7.1.2. A detailed listing of relevant experience.

7.1.3. A minimum of three (3) client references from similar projects.

8. Review of Applications

8.1. Evaluation by the City of Richmond

8.1.1. The City of Richmond will review the Proposals submitted to determine whether, in the City Richmond's opinion, the Proponent has demonstrated that it has the required experience and qualifications to fulfill the obligations of the services identified in this EOI.

8.2. Inquiries

8.2.1. The City of Richmond, in its sole discretion and without having any duty or obligation to do so, may conduct any inquiries or investigations, including but not limited to contacting references, to verify the statements, documents, and information submitted in connection with the Proposal and may seek clarification from the Proponent's bankers and clients regarding any financial and experience issues.

8.2.2. Subsequent to the receipt and review of responses the City reserves the right to issue a RFP for all or part of the requirement described herein or with any Proponent or with any number of Proponents concurrently for the purpose of entering into an agreement or to cancel this process in its entirety.

9. Non-Conforming Applications

9.1. Proposals which fail to conform to the Format Requirements or which fail to conform to any other requirement of these Documents may be rejected by the City. Notwithstanding the foregoing or any other provision of these Documents, the City may at its sole discretion elect to retain for consideration Proposals which deviate either materially from the format requirements set out in hereto or which otherwise fail to conform to any other requirement of these EOI's except the requirement of delivery of the Proposal prior to Closing Time.

10. Notifications and RFP Process

10.1. Following the Closing Time, the City of Richmond will only notify those Proponents who are selected as being pre-qualified and may be invited to submit their proposal under an RFP process if required.

10.2. Any change in the structure or formation of a short-listed Proponent shall be subject to prior written approval of the City of Richmond prior to the deadline for submission of proposals. The City of Richmond may deny that approval if, as a consequence of any change, the change in the structure or formation of the Proponent, as presented, would have affected whether or not the Proponent would have short-listed in the first instance.

- 10.3. The City of Richmond may unilaterally take the following actions, and shall not be liable for any such actions:
- 10.3.1. amend the scope and description of the products and services to be procured under any RFP process as described in this EOI, and the qualifications that may be required to meet those requirements. In such event, proposals may be invited from those Proponents who meet the resulting amended requirements;
 - 10.3.2. reject or accept any or all Applications;
 - 10.3.3. cancel the EOI process at any time and reject all Proposals; or
 - 10.3.4. cancel the EOI process and recommence in respect of the same RFP with the same or an amended set of document, information and requirements.
- 10.4. The Proponent acknowledges and agrees that any EOI is in no way whatsoever, an offer to enter into an agreement and submission of an Application by any Proponent does not in any way whatsoever create a binding agreement. The Proponent acknowledges that the City of Richmond has no contractual obligations whatsoever arising out of the EOI process.
- 10.5. The Proponent acknowledges and agrees that the prequalification of a Consultant pursuant to this EOI is only a preliminary step in the City of Richmond's procurement process. Each successful Proponent will be evaluated further under any subsequent RFP (if required) evaluation process.

11. Information Disclaimer

- 11.1. The City of Richmond and its directors, officers, employees, agents consultants and advisors are not liable or responsible for any verbal or written information, or any advice, or any errors or omissions, which may be contained in this EOI or otherwise provided to the Consultant pursuant to these EOI.
- 11.2. The Proponent shall conduct its own independent investigations and interpretations and shall not rely on the City of Richmond with respect to information, advice, or documentation provided by the City of Richmond. The information contained in these EOI's is provisional and will be superseded by the RFP and other agreement documents.
- 11.3. The City of Richmond makes no representation, warranty, or undertaking of with respect to this EOI and the City of Richmond and its directors, officers,

employees, agents, consultants and advisors, shall not be liable or responsible for the accuracy or completeness of the information in this EOI or any other written or oral information made available to any interested person or its advisors, and any liability however arising, is expressly disclaimed by the City of Richmond.