



REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN

REQUEST FOR QUALIFICATIONS

for the

**MICROSOFT ENTERPRISE AGREEMENT &
SOFTWARE LICENSE MANAGEMENT SERVICES**

RDOS-23-IT-04

[April 2023]

REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN

REQUEST FOR QUALIFICATIONS

**[MICROSOFT ENTERPRISE AGREEMENT &
SOFTWARE LICENSE MANAGEMENT SERVICES]**

REQUEST FOR QUALIFICATIONS

MICROSOFT ENTERPRISE AGREEMENT & SOFTWARE LICENSE MANAGEMENT SERVICES

Qualification packages may be submitted to the REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN, Reception, 101 Martin Street, Penticton, BC V2A 5J9, or

Submissions **may also be sent electronically** to the following email address:
dfrancisco@rdos.bc.ca

CLOSING DATE: May 5th, 2023 @ 2:00PM Local Time

Note: Questions will not be accepted or answered 48 hours prior to the closing date and time.

*** QUALIFICATIONS WILL NOT BE OPENED IN PUBLIC ***

In order to submit a response to this Request for Qualifications, the respondent **MUST** be registered as a Plan taker on the BC Bid Web Portal:

<https://www.bcbid.gov.bc.ca/page.aspx/en/usr/login?ReturnUrl=%2fpage.aspx%2fen%2fbuy%2fhomepage>

Only by being registered, can a respondent be certain to receive addenda notifications. It is the Respondent's (Plan taker's) responsibility to acknowledge all Addenda.

INTRODUCTION

The Regional District of the Okanagan-Similkameen (RDOS) is seeking a partner to process the RDOS's Microsoft Enterprise Agreement Renewal & Software License Management Services and obtaining the best pricing structure available.

Organizations wishing to respond to this Request for Qualifications (RFQ) must be an authorized Microsoft Licensed Solutions Provider (LSP).

Hard copy submissions must be submitted in a closed envelope and will be received up to 2:00pm local time on **May 5th, 2023** at:

Contact: REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN
101 Martin St, Penticton, BC
Penticton, BC, V2A 5J9

Submissions **may also be sent electronically** to the following email address:
dfrancisco@rdos.bc.ca

1 **INSTRUCTIONS TO RESPONDENTS:**

1.1 **PURPOSE AND LEGAL EFFECT**

- .1 The purpose of this document is to obtain Qualification submissions from Respondents interested in providing Microsoft Enterprise Agreement & Software License Management Services and selecting a partner using the evaluation criteria provided in section 1.7.
- .2 No contractual obligations what so ever shall arise between the RDOS and any person or firm as a result of the RDOS's request for the submission of qualifications or the making of any submission to the RDOS in response to this request. The contents of these Qualification Instructions are statements of RDOS intention only and are not promises (contractually binding or otherwise) on the part of the RDOS.
- .3 Respondents are responsible for any costs incurred to prepare their submission.

1.2 **QUALIFICATIONS SUBMISSIONS**

- .1 Submissions will not be publicly opened.
- .2 The RDOS may modify the Qualification Documents listed in section 1.9 by issuing addenda which shall be posted on the BC Bids website :
<https://www.bcbid.gov.bc.ca/page.aspx/en/usr/login?ReturnUrl=%2fpage.aspx%2fen%2fbuy%2fhomepage>
- .3

- .4 Please do **not** provide pricing information at this time.

1.3 QUALIFICATION FORM

- .1 Supply all information requested on the forms supplied by the RDOS.
.2 If the space provided is insufficient, extra sheets may be attached.

1.4 ADDITIONAL INFORMATION FROM SUBMITTING FIRMS

- .1 The RDOS may request additional information or clarifications from any firm making a submission.

1.5 INTERPRETATIONS AND MODIFICATIONS OF QUALIFICATION DOCUMENTS

- .1 Submit questions about the meaning and intent of the Qualification Documents, as identified in section 1.9 of these Prequalification Instructions, to:

Danny Francisco, IT Manager
Tel: 250-490-4127
Email: dfrancisco@rdos.bc.ca

- .2 Please notify the RDOS of any ambiguity, inconsistency or error discovered upon examination of the Qualification Documents.

1.6 QUALIFICATIONS

Please demonstrate the following in your submission:

A Experience, Reputation, Capability(S) and Resources

- Respondent'(s) and proposed team experience in managing clients of comparable size, scope and complexity;
- Demonstrate independence (i.e. not affiliated with any specific provider of goods or service);
- A description of the Inside sales team and comprehensive details of all services provided;
- Confirmation that the company is a Microsoft Authorized Enterprise Software Advisor (ESA);
- References from recent clients, description of similar services provided; indicating project, duration and client contact details; refer to Appendix A.

B Support Services

- Software management services the organization provides. In particular, compliancy, auditing and reporting services for software purchased through the organization and other Respondents;
- Any additional services the organization provides in support of the Microsoft Enterprise Agreement and other software Respondents;
- Quality Assurance;
- Customer Service;

- In house Microsoft Licensing Specialist

C Financial, Sustainability and Value Added

- Value Added – ie: what is exceptional about your company and what benefits would be provided to the RDOS;
- Sustainability - innovation and practises in balancing social, economic and environmental considerations;
- Confirm access to B.C. Provincial Government Contract Pricing;
- Describe how your company will endeavor to obtain the best possible licensing pricing structure for the RDOS. See methodology form on page 9.

D References

- Please provide a list of references complete with full contact information.
- Upon submitting a response to this RFQ, Respondents consent to the RDOS and their representatives checking and verifying the information provided. References may be contacted. Reference checks will be kept confidential and will not be reviewed or discussed with Respondents. In addition to the references provided by the Respondent, the RDOS may also contact other Municipalities and owners of its choosing.

The following is a list of products the RDOS is renewing:

SCHEDULE A

Microsoft Enterprise Agreement

The Licenses involved are as follows:

Total of 150 seats consisting of:

- (20) MS E5
- (100) MS E3
- (30) MS F3, licenses

TERMS OF REFERENCE

NOTE: The quantities listed above are for estimation purposes only and are not a commitment by the RDOS. The types and quantities are subject to change upon review and confirmation at a later date.

1.7 EVALUATION

Each qualification submission will be evaluated against the predetermined criteria listed below and the RDOS will select one Respondent to provide the services requested. The RDOS's decision shall be final.

Criteria
Experience
Support Services
Financial Value Added
References
Methodology

1.8 TERM OF CONTRACT

- .1 To be determined.

1.9 DOCUMENTS

- .1 Qualification Instructions
- .2 Qualification Forms
- .3 Addenda (if any)

END OF SECTION

QUALIFICATION FORMS

SUBMISSION TO: REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN
101 Martin St
Penticton, B.C. V2A 5J9

REQUEST FOR QUALIFICATIONS – SUBMISSION FORM
FOR
**MICROSOFT ENTERPRISE AGREEMENT & SOFTWARE LICENSE MANAGEMENT
SERVICES**

THE UNDERSIGNED FIRM (the “Respondent”) has prepared this submission of qualifications for the REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN (the “RDOS”) for the above project.

BY PREPARING THIS SUBMISSION, THE RESPONDENT ACKNOWLEDGES AND AGREES AS FOLLOWS:

1.1. NO CONTRACT A AND NO CLAIMS:

This RFQ process is not intended to create binding offers and no contractual obligations whatsoever (including what is commonly referred to as ‘Contract A’) shall arise between the RDOS and any Respondent upon the submission of a Proposal in response to this RFQ. For extra clarity, both the Respondent and the RDOS are free to cancel their participation in this RFQ process at any time up until the execution of a written agreement.

Without limiting the above paragraph, no Respondent shall have any claim whatsoever against the RDOS for any damage or other loss resulting from a Respondent’s participation in this RFQ, including where the RDOS does not comply with any aspect of this RFQ and including any claim for loss of profits or RFQ preparation costs should the RDOS not execute a Contract with the Respondent for any reason whatsoever.

Name of Respondent: _____

Address: _____

RDOS: _____

Postal Code: _____

Tel: _____

Fax: _____

Email: _____

SIGNED, this _____ day of _____, 20__

(Print or Type Name of Respondent’s Firm)

(Signature of Authorized Signatory for Respondent Firm)

QUALIFICATION QUESTIONNAIRE

Please Complete the Following Information.

1. CORPORATE

Name: _____

Provinces Registered: _____

Number of Full-Time Employees: _____

2. EXPERIENCE:

How long has your firm been in business? _____

List a recent work history of projects and value of the projects. Give location, brief description of the work, the owner's name and address and the name, telephone and email address of the owner's representative who can knowledgeably act as a reference for the performance of the work.

	Project Name and Location	Number of Licenses	Year Completed	Owner Reference
1.				
2.				
3.				
4.				
5.				
6.				

Methodology Form

(**Describe** the methods your company will use to manage licensing and obtain the best possible price structure for the RDOS.) If the space provided is insufficient, you may add additional pages. Please include this with your submission. **Brochures are welcome but they may not be used to solely demonstrate your methodology.**