



THE CITY OF
COLUMBUS
ANDREW J. GINTHER, MAYOR

**Microsoft Exchange
Environment and Public
Folder Assessment**

JULY 10, 2019

HMB

Columbus Headquarters
570 Polaris Parkway, Suite 125
Westerville, OH 43082
Tel: 614.221.6831

CITY OF COLUMBUS
MICROSOFT EXCHANGE ENVIRONMENT
AND PUBLIC FOLDER ASSESSMENT

Table of Contents

1. COVER LETTER.....	2
2. SOQ EVALUATION CRITERIA SUMMARY.....	3
3. APPENDIX A: QUALIFICATION QUESTIONNAIRE.....	5

1. Cover Letter

Evaluation Committee
City of Columbus
1111 East Broad Street, 2nd Floor
Columbus, Ohio 43205

Evaluation Committee:

Harris, Mackessy & Brennan, Inc. (HMB) is pleased to submit the attached Statements of Qualification Response to the City of Columbus for the Microsoft Exchange Environment and Public Folder Assessment.

HMB is an Ohio corporation using federal tax identification number 31-1410213. HMB is headquartered at 570 Polaris Parkway, Suite 200, Westerville, OH 43082 and we are pleased to serve the State of Ohio, the City of Columbus, and Franklin County communities. HMB is a State of Ohio information technology state term schedule-holder. Our State Term Schedule number is #534407.

In this response, we have provided an overview and summary of how we align to the Statement of Qualifications as well as the Qualification Questionnaire with the details requested. We are confident that selecting HMB in this effort will ensure that you are meeting your overall goal of assuring the City of Columbus is receiving the highest quality consulting possible at a fair and reasonable cost to the public.

For any questions regarding this response, please contact John Sohner:

P: (614) 370-3002 E: jsohner@hmbnet.com

We look forward to the opportunity of working with you on this initiative.

Sincerely,



Doug Donovan
Chief Strategy Officer

2. SOQ Evaluation Criteria Summary

The purpose of this section is to highlight and reference the list of qualification criteria captured in the City of Columbus-Request for Statements of Qualifications. This section provides a summary and overview for how HMB aligns with each of the defined criteria. Additional details are provided in the completed Qualification Questionnaire requested and is included in this response.

Competence of Offeror

The HMB team is confident that we will meet or exceed your criteria surrounding our competence to perform and deliver in this effort. We have highlighted in item #5 and item #6 on the included Qualification Questionnaire (Appendix A) the details of our highly skilled staff members and leadership and the relevant project work they have completed complimentary to the work defined in this effort.

HMB built our team with outstanding people of high integrity and professionalism who are career-minded and believe in doing the right thing to consistently deliver the highest quality products and services.

Firm's Past Performance with other customers

HMB, Inc. was founded in 1994 in Columbus, Ohio with a focus on providing superior IT services for our customers. From the beginning, we believed in building lasting and meaningful partnerships with our customers. Viewing each engagement and project through this lens has allowed us to grow and be a trusted partner to more than 250 customers.

Today, HMB has earned its place as a premiere IT consulting firm. HMB is a provider of advanced technology solutions that assist our customers in the pursuit of their strategic goals. With more than 25 years of IT consulting, project management, enterprise content management, and system integration experience we have had the privilege of developing solutions for organizations in varying industries such as public sector, education, energy, real estate development, healthcare and more.

HMB is proud of the work that we have done with other customers and the partnerships that we have built over the many years we have been in business. We encourage you to reach out to our clients on the great work we have done. We have included details and contact information in item #7 on the included Qualification Questionnaire (Appendix A).

Ability to respond quickly and thoroughly to requests and contract requirements

We have the key leadership staff and the support staff in place to respond appropriately, thoroughly, and timely to our client's requests and any contract related requirements. We understand that being a true valued partner is all about transparency and being courteous, aware, and responsive to our clients' needs to ensure a positive and successful engagement.

Local Workforce

Today, HMB has almost 250 employees who live in the State of Ohio with over 175 living in Franklin County. The majority of our employees work and/or live in the City of Columbus and the Team's project labor costs will be assignable to employees paying City of Columbus income tax. We are proud and engaged members of the communities that we serve! Based on the criteria highlighted in this request, HMB qualifies for the following:

"At least 90% of the Team's project labor costs are assignable to employees paying City of Columbus income tax on the date the SOQ is submitted, or at least 90% of the Team's project labor costs are assignable to the office location within Franklin County if the office was established prior to 1995."

3. Appendix A: Qualification Questionnaire

See the following section for Appendix A.

APPENDIX A

QUALIFICATION QUESTIONNAIRE



DEPARTMENT OF TECHNOLOGY
Microsoft Exchange Environment and Public Folder Migration Assessment

MICROSOFT EXCHANGE ENVIRONMENT
AND PUBLIC FOLDER MIGRATION
ASSESSMENT

QUALIFICATION QUESTIONNAIRE

RFSQ Number RFQ012823

Due Wednesday July 10, 2019 at 11:00
AM

<https://columbus.bonfirehub.com/opportunities/17185>

Harris, Mackessy & Brennan, Inc. (HMB)

Consultant:

Date:

7 10 2019

Page 1
DEPARTMENT OF TECHNOLOGY
QUALIFICATIONS QUESTIONNAIRE for
MICROSOFT EXCHANGE AND PUBLIC FOLDER MIGRATION
ASSESSMENT

Date: 7/10/2019

(month, day and year)

FIRM: [Harris, Mackessy & Brennan, Inc. \(HMB\)](#)

1. Qualifications:

I. Microsoft Exchange Environment and Public Folder Migration Assessment:

Microsoft Exchange Environment and Public Folder Migration Assessment expert capable of assessing the City of Columbus's current Microsoft Exchange Environment to provide a recommended roadmap including all of the artifacts listed below. This assessment should include both the current Microsoft Exchange Environment and the migration of public folders from Microsoft Exchange 2007 to Microsoft Exchange 2013. Assessment artifacts:

- Microsoft Exchange roadmap of current Microsoft Exchange environment to the best and least cost path per industry recommended standard which meet the City's requirements. Including:
- Project charter for migration of current environment to recommended roadmap path. Project charter should include:
 - Project scope, requirements, and dependencies
 - Description of the people resources required and the role of each resource
 - Server, client, staff augmentation, and other resources
 - RACI of each resource
 - Hourly effort estimate of each resource
 - Identified project and security risks
 - Organizational change management plan for the city
 - High level project plan that includes a timeline and deliverables
 - Success criteria
 - 5 year total cost of ownership of recommended roadmap path. One-time upfront costs, project implementation costs, licensing and third party software costs, and any reoccurring licensing and maintenance/support costs

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- Microsoft Exchange 2007 Public Folder migration to Microsoft Exchange 2013 to the best and least cost path per industry recommended standard which meet the City's' requirements. Including:

2

- Project charter for migration of public folders to Microsoft Exchange 2013.
 - Project charter should include:
 - Project scope, requirements, and dependencies
 - Description of the people resources required and the role of each resource
 - Server, client, staff augmentation, and other resources
 - RACI of each resource
 - Hourly effort estimate of each resource
 - Identified project and security risks
 - High level project plan that includes a timeline and deliverables
 - Success criteria
 - Budgetary cost estimates of total migration including estimated hourly rates of any required staff augmentation resources

Page

DIVISION OF TECHNOLOGY
QUALIFICATIONS QUESTIONNAIRE for
MICROSOFT EXCHANGE ENVIRONMENT AND PUBLIC FOLDER MIGRATION ASSESSMENT

2. COLUMBUS CONTRACT COMPLIANCE NUMBER: **CC005291**

Firms that do not have a City of Columbus Contract Compliance number must obtain one from the Purchasing Office prior to being awarded a contract.

City Certified MBE City Certified FBE City Certified MBR
(Mark with an X any that apply)

City Certified HIS City Certified ASN

3. CORPORATE OFFICE BUSINESS ADDRESS AND TELEPHONE NUMBER (INCLUDING SUBS)

**570 Polaris Parkway, Suite 200
Westerville, OH, 43082
PH: 614.221.6831**

LOCAL OFFICE BUSINESS ADDRESS AND TELEPHONE NUMBER (INCLUDING SUBS)

**570 Polaris Parkway, Suite 200
Westerville, OH, 43082
PH: 614.221.6831**

4. CONTACT NAME, TELEPHONE NUMBER AND EMAIL ADDRESS

**John Sohner
PH: 614.370.3002**

Page
 DIVISION OF TECHNOLOGY
 QUALIFICATIONS QUESTIONNAIRE for
 MICROSOFT EXCHANGE ENVIRONMENT AND PUBLIC FOLDER MIGRATION ASSESSMENT

5. KEY PROJECT MANAGEMENT PERSONNEL. List key personnel (Microsoft Exchange Environment and Public Folder Migration Assessment resources) of firm who may be assigned to perform work and list their responsibilities. Also list any key personnel from a sub-consultant that is anticipated to perform work and list their responsibilities. **Clearly identify one (1) person that will be assigned as the Microsoft Exchange Environment and Public Folder Migration Assessment with a pound symbol (#).** Indicate local office personnel by bold lettering.

Name	City & State of office if not at Local Office	Title	Yrs. Exp.	Work Responsibilities
Terry Every	Local Office	Director, Infrastructure	15	Managing strategy for HMB infrastructure practice
Brian Trenton #	Local Office	Principal Consultant	7	Microsoft Engineer and Architect
Jim Everett	Local Office	Director, Solution Engineering	17	Managing Assessment Delivery for Customers
Cary Hampton	Local Office	Principal Consultant	10	Microsoft Engineer and Architect

DEPARTMENT OF TECHNOLOGY
 QUALIFICATIONS QUESTIONNAIRE for
 MICROSOFT EXCHANGE ENVIRONMENT AND PUBLIC FOLDER MIGRATION ASSESSMENT

6. COMPETENCE OF OFFEROR: List Microsoft Exchange Environment and Public Folder Migration Assessment staff members and subs that will be involved in the project. The consultant is encouraged to select recent projects that are similar to the qualifications indicated in the SOQ. **Please limit responses to no more than 8 projects per category (i.e. maximum of 32 total projects for this section). Do not submit 32 projects for each team member.**

Note: The selected projects should only be those which are similar to other Microsoft Exchange Environment and Public Folder Migration Assessment Personnel from Item 5 have been involved.

Include brief description of work performed by the individual on the listed project

Name(s) of Staff Involved in Project	Project Name	Design Year	Description of work performed including year of design (Highlight water distribution experience in bold)	Client & Contact Information (Include telephone number and email address)
Terry Every Brian Trenton Cary Hampton	O365 Assessment / Implementation	2019	Migrate 300 mailboxes to Exchange Online	Mission Essential
Terry Every Brian Trenton	Email Assessment / Migration	2018 2019	Replace Transport rules from Trend Micro to Exchange Online	YUM! Brands
Brian Trenton	Email Migration	2018	Tier 2/3 support for migration from Exchange 2010 with Public Folders to Exchange Online. 300 Mailboxes	City of Gahanna
Brian Trenton	Email Migration	2017	Migration to Exchange Online with Federation Enabled. 100 Mailboxes	Toyota
Terry Every Brian Trenton	Email Assessment / Migration	2018	Migration from Exchange 2013 to Exchange Online for 300 Mailboxes	Roush Auto Group
Brian Trenton	Email Migration	2017	Migration from Exchange 2010 to Exchange online for 150 Mailboxes	Primary One Health

Brian Trenton	Email Migration	2015	Migration from Exchange 2010 to Exchange online for 20 Users	Ohio Foundation Of Independent Colleges
Brian Trenton	Email Migration	2014	Migration from Exchange 2007 to Exchange online for 35 users	Hilton-Polaris Columbus

Page 5
DIVISION OF TECHNOLOGY
QUALIFICATIONS QUESTIONNAIRE for
MICROSOFT EXCHANGE ENVIRONMENT AND PUBLIC FOLDER MIGRATION ASSESSMENT SERVICES

7. **FIRM'S PAST PERFORMANCE:** List past projects information by the submitting Firm. This response is limited to 10 recent projects. This information will be used to determine Firm's past performance on DOT projects and similar non-DOT projects. Provide project descriptions that focus on project features relevant to Microsoft Exchange Environment and Public Folder Migration Assessments. Include descriptions of projects that incorporated efficient and effective outcomes in Microsoft Exchange Environment and Public Folder Migration Assessment projects. Bolden project names that were performed by personnel who will be assigned to work on the DOT projects. **List reference names and contact information (include email address & telephone number) for all projects.**

Project	Client & Contact Information (include telephone number & email address)	Design Year	Project Budget	Description of Work Performed & Key Project Personnel
O365 Assessment / Implementation	Mission Essential, Kevin M. Crawford 937.361.2155, kevin.crawford@missionessential.com	2019	\$215,000, Fixed Bid	Migrate 300 mailboxes to Exchange Online, Migrate Skype for Business to Teams Online, SharePoint migration to online, File Shares to OneDrive, Integration with Okta
Email Assessment / Migration	YUM! Brands, Gauri Bhalerao 502-874-8300, Gauri.Bhalerao@yum.com	2018 2019	\$60,000, Fixed Bid	Replace Transport rules from Trend Micro to Exchange Online
Email Migration	City of Gahanna, Craig Main 614.342.4070, craig.main@gahanna.gov	2018	\$2,400, 16 Hours	Tier 2/3 support for migration from Exchange 2010 with Public Folders to Exchange Online. 300 Mailboxes

Email Assessment / Migration	Roush Auto Group, Ed Green 614.942.4356, egreen@roushhonda.com	2018	\$25,200, Fixed Bid	Migration from Exchange 2013 to Exchange Online for 300 Mailboxes
Email Migration	Toyota	2017	\$27,500, Fixed Bid	Migration to Exchange Online with Federation Enabled. 100 Mailboxes
Email Migration	Unified Trust	2017	\$25,393, 180 Hours	Migration to Exchange Online from Google Email for 250 Mailboxes
Email Migration	Primary One Health, Jeff McGlade 614-859-1947	2017		Migration from Exchange 2010 to Exchange online for 150 Mailboxes
Email Migration	Ohio Foundation of Independent Colleges, Wendy Thornton, 614-469-8764	2015		Migration from Exchange 2010 to Exchange online for 20 Users
Email Migration	Hilton-Polaris Columbus, Nancy Howard, 614.885.9035	2014		Migration from Exchange 2007 to Exchange online for 35 users
Exchange Assessment, Email Migration and upgrade	YUM! Brands, Gauri Bhalerao 502-874-8300, Gauri.Bhalerao@yum.com	2015		Managed team and developed strategy for migration of 18,000 users globally from on-prem to Office 365, including public folders to SP/OneDirve. Additionally, migration of 45,000+ stores globally from 2007 to 2013

DEPARTMENT OF TECHNOLOGY
 QUALIFICATIONS QUESTIONNAIRE for
 MICROSOFT EXCHANGE ENVIRONMENT AND PUBLIC FOLDER MIGRATION ASSESSMENT

8. TOTAL PERSONNEL OF FIRM

	Corporate Office	Local Office	Other Offices	Total
A. Microsoft Exchange Engineer	3	3	2	5
B. Other Professionals	212 Consultants (.Net/Azure/Microsoft/PM/DEV)	174	22	196
C. Others	46 Administrative/Leadership	46	16	62
Total		224	38	263

9. LOCAL WORKFORCE: The offeror shall indicate which of the following categories their percentage of local workforce falls within and show how this number was determined. The Team includes the prime consultant and all sub-consultants.

- A. At least 90% of the Team’s project labor costs are assignable to employees paying City of Columbus income tax on the date the SOQ is submitted, or at least 90% of the Team’s project labor costs are assignable to the office location within Franklin County if the office was established prior to 1995.
- B. At least 75% of the Team’s project labor costs are assignable to employees paying City of Columbus income tax on the date the SOQ is submitted.
- C. At least 90% of the Team’s labor will be performed in an office location within Franklin County but outside of the Columbus Corporate limits on the date the SOQ is submitted.
- D. At least 50% of the Team’s project labor costs are assignable to employees paying City of Columbus income tax on the date the SOQ is submitted.
- E. E. None of the above.

HMB meets A.

At least 90% of the Team’s project labor costs are assignable to employees paying City of Columbus income tax on the date the SOQ is submitted, or at least 90% of the Team’s project labor costs are assignable to the office location within Franklin County if the office was established prior to 1995.

10. SUBCONSULTANTS (IF REQUIRED)

Category	Sub-consultant's Name
A. Planning	None
B. Design	None
C. Operations	None
D. Other:	None
E.	

Page
 DIVISION OF TECHNOLOGY
 QUALIFICATIONS QUESTIONNAIRE for
 MICROSOFT EXCHANGE ENVIRONMENT AND PUBLIC FOLDER MIGRATION
 ASSESSMENT

11. List current hourly rates for proposed personnel on an hourly, weekly and monthly rate schedule.

Position Title	Typical Role	Hourly Rate (1 hour)	Weekly Rate (40 hours)	Monthly Rate (160 Hours)
Project Manager/Director	Manage project timelines and deliverables with the client.	\$196.00	\$7,840.00	\$31,360.00
Microsoft Licensing Architect	Evaluate the license requirements for the 2 alternative options	\$150.00	\$6,000.00	\$24,000.00
Exchange Architect	Create a technical design based on customer requirements.	\$150.00	\$6,000.00	\$24,000.00
Exchange Engineer	Review design and create a roadmap for the initiative.	\$125.00	\$5,000.00	\$20,000.00
Business Analyst	Drive Needs Analysis and requirements gathering.	\$85- \$135 (Range)	\$3400- \$5400 (Range)	\$13,600- \$21,600 (Range)

The resultant professional services contract will permit an annual review of hourly rates for successive contract years.

CONFIDENTIAL QUALIFICATION QUESTIONNAIRE CERTIFICATION

I have carefully examined the Request for Statement of Qualifications, Appendices and any other documents accompanying or made a part of this RFSQ.

I hereby propose to furnish the goods or services specified in the Request. I agree that my proposal will remain firm for a period of up to 120 days in order to allow the City adequate time to evaluate the qualifications submitted.

I verify that all information contained in this proposal is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to submit this proposal on behalf of the firm as its act and deed and that the firm is ready, willing and able to perform if awarded the contract.

I further certify, under oath, that this proposal is made without prior understanding, agreement, connection, discussion, or collusion with any other person, firm or corporation submitting a proposal for the same product or service: no officer, employee or agent of the City of Columbus or any other Contractor's is interested in said proposal, and that the undersigned executed this Contractor's Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

NAME OF FIRM OR INDIVIDUAL SUBMITTING QUESTIONNAIRE

Harris, Mackessy & Brennan, Inc. (HMB)

NAME AND TITLE OF PERSON SIGNING (PLEASE TYPE)

Doug Donovan, Chief Strategy Officer

SIGNATURE



DATE

7/10/2019