SUNCORP VALUATIONS

Request for Information

Information Technology Services

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support@suncorpvaluations.com

SUNCORP VALUATIONS

1. Background, Goals and Objectives

Suncorp Valuations (Suncorp) is a services appraisal firm that provides costing, valuation, and consulting services across a broad spectrum of business sectors, property, and asset types with global coverage. Suncorp has over 50 years of experience employing professional appraisal staff and consultants to provide Suncorp's brand promise to its clients.

Suncorp has an internal IT department which is resourced by a combination of internal IT staff and outsourced IT managed services Vendors. The IT environment is comprised of a traditional on-premises Microsoft server environment with augmented M365 services for collaboration, messaging, and Office software suites. This IT environment along with a limited number of SaaS products provide access to all required business applications and data repositories utilized by Suncorp's 110+ employees and 50+ subcontractor staff.

Suncorp maintains corporate offices based in Saskatoon, Milwaukee, and Vancouver. It has adopted a flexible-hybrid work policy across the company and the vast majority of staff work remotely. Remote access technologies are utilized (e.g., M365, VPN, RDS) to access the application systems and data repositories within the corporate infrastructure which is housed in a SaskTel Data Centre located in Saskatoon. The majority of Suncorp's staff compliment are domestic, with a significant US presence and smaller portion of employees and contractors distributed globally (e.g., India). Suncorp's professional staff travel on a regular basis to client sites globally to perform professional appraisals.

The existing current state IT environment and application footprint has supported and enabled Suncorp's recent growth. However, the current IT environment lacks the capability to effectively scale to enable Suncorp to fully implement digital business operations, workflows, and service delivery.

Suncorp is developing a digital transformation strategy which includes modernization of the technology workplace, implementation of scalable cloud infrastructure, and development of modern cloud-based business applications.

To support the future state digital transformation strategy, Suncorp is conducting an RFI survey of the marketplace to identify current Information Technology Services capabilities to support its current state IT environment, provide future state cloud design and implementation services, with subsequent IT operations in a cloud environment.

The sections below outline Suncorp's RFI Process, Current State IT Environment, Future State IT Environment, Requested Information Requirements, and RFI Evaluation and Terms.

2. RFI Process

The RFI process is a standalone and independent investigation to inform Suncorp of current Vendor capabilities in the marketplace. Suncorp makes no implicit or explicit commitment to any subsequent procurement processes (e.g., RFP) or further service engagement or negotiation with any Vendor.

The intention of the RFI is identify candidate Vendors that can fulfill Suncorp's Information Technology Service requirements. At Suncorp's sole option, Suncorp may interview top-ranked Vendors and request presentations.

Suncorp anticipates the following schedule of events related to the RFI process:

RFI Release Date	February 23, 2024
RFI Submission Deadline	March 15, 2024
Review of Submission Completion	March 22, 2024
Vendor Presentations	March 25 to April 12, 2024

All dates listed in this RFI may be subject to change at Suncorp's sole discretion. Any date changes will be posted on Suncorp's web site (www.suncorpvaluations.com).

Vendors shall provide a straightforward, complete, and concise description of their capabilities to satisfy the requirements of this RFI.

All submissions, requests for clarifications or inquiries regarding this RFI must be provided in writing to Suncorp at support@suncorpvaluations.com.

No other contact representative at Suncorp is authorized to communicate with respect to this RFI, unless subsequently identified.

Any Vendor response not received by 3:00 pm CST on the RFI Submission Deadline will be deemed to be disqualified from further consideration by Suncorp.

Vendor submissions must include the elements and follow the structure listed below:

1. Cover letter introducing the RFI response, interest in Suncorp, and main contact personnel.
2. Introduction of the company, profile, background, key partnerships, number of staff, geographic coverage, financial standing and any certifications (e.g., SOC2, ISO).
3. Summary of the Vendor's experience and period providing similar services, with size of current client base/service volume, example customer cases, testimonials/satisfaction surveys, and description of any early termination situations.
4. Detailed information section describing the Vendor's Information Technology Service capabilities which must include:
    a) A statement of the Vendor's understanding of Suncorp's current and contemplated future state IT environment (see sections 3, 4 and 7);
    b) Detailed description of the Vendor's capabilities (see section 5);
    c) Acknowledgement of Suncorp's RFI Evaluation and Terms (see section 6); and
    d) Availability for interviews and presentations.

3. Current State IT Environment

Suncorp's current state IT environment is described below and further depicted in Section 7.

Resource Model:

- Internal IT Department, including roles for Senior Business Analysis, Application/Technical Architect, IT Director.

- Outsourced Managed Services Provider (MSP) providing administration, support and operations of Suncorp's server, storage, backup, network, firewall, end-user computing, end-point security, messaging/collaboration, and M365 systems with service desk, project delivery and end-user training services.
- Outsourced maintenance and support services for the internal Mitel/Micollab phone system.
- Variety of outsourced maintenance, support and project delivery services for individual applications including Maximizer CRM, Uplands Resource Management, Dayforce, SAGE accounting, and off-the shelf appraisals software (e.g., TOTAL).

IT Technical Environment Summary:

- The IT environment is comprised of a traditional on-premises Microsoft server environment with augmented M365 services for collaboration, messaging, and Office software suites. These servers are housed within a SaskTel Data Centre located in Saskatoon. There currently are 36 virtual servers in production with Windows Server 2016 DC running on a 4 node Nutanix cluster with AHV. The server functional composition includes file/print, database, reporting, RDS farm, domain controller, IIS, development, and testing servers.
- Suncorp maintains corporate offices based in Saskatoon, Milwaukee, and Vancouver which are connected with site-to-site VPN tunnels to the SaskTel data center. The Saskatoon and Milwaukee offices are equipped with local network infrastructure (Wi-Fi, data LAN, voice LAN, firewall) while the Vancouver office is based on a shared Regis office space.
- Remote access technologies are utilized (e.g., VPN, RDS) to access the systems in the SaskTel data center. Access to the data center within the corporate offices is direct over the site-to-site VPN tunnel.
- All employees are equipped with Windows 10 laptops which are within 3 years of currency along with dual displays and docking stations. Sub-contractors are required to supply their own end-user computer devices and software with limited exceptions (e.g., Suncorp supplies an email account and remote access to the Subcontractor Job Portal published on RDS).
- Business applications are loaded onto a standard laptop image and access to data repositories (e.g., file, reports, database) at the data center and over the Internet to MS 365 (OneDrive, SharePoint). These applications include key line of appraisal related business applications, office productivity tools, backend office tools and technical tools to assist the appraisal process. SaaS tools are accessed directly through the Internet. A Remote Desktop farm is in place to provide a workspace for offshore employees, access to specialized applications, and as alternative access for employees using non-Suncorp devices.

IT Technical Environment Components:

- **Servers, Storage, Backup**: 36 Windows Server 2016 DC, Nutanix 4 Node, 8 x Intel Xeon-Gold 5317 CPU, 1.5TB RAM, 92TB Disk, AOS Pro License. QNAP SAN local storage (128TB) with 15 days retention. Veeam backup (supplied by MSP), off-site storage with Whipcord with 15 days retention.
- **Active Directory:** Combination on premise AD and Azure AD, with one-way M365 (OneDrive, SharePoint, Teams, Exchange) tenant synchronization, on-premise GPO for servers / laptops, Intune policy for laptops.

- **Network Infrastructure:** 2 x 10GB Dell S4048T (48x 10GBaseT, 6x 40GbE QSFP+, IO to PSU air, 2x AC PSU, OS9) in data center. Dell 1Gbps switches in Saskatoon and Milwaukee offices. Sophos firewalls (Saskatoon DC – XGS 3300 with HA, Saskatoon office – XGS 2100, Milwaukee – XGS 136, Vancouver – XGS 116), Aruba Wi-fi in Saskatoon, Milwaukee, and Vancouver. Dual 1Gbps ISP in data center, dual ISPs in Saskatoon and Milwaukee office, single ISP in Vancouver shared space, local gateway on laptops.
- **Security:** Sophos End-point Agent installed all Windows devices, Inter-VLAN protection in data center with Sophos firewall, MS Authenticator (primary use), DUO Authenticator (limited use – to be replaced).
- **Data and Database:** Combination of structured databases (MS SQL Server 2016, 2019 – 2TB among 45+ instances, separate PROD, TEST and DEV) and unstructured file repositories (14TB on file servers). External client data exchange with Citrix ShareFile. Combination of fully automated/integrated report generation (MS Word), SSRS, with automated data import processes, and ad hoc PowerBI queries.
- **Applications**: Combination off-the shelf (e.g., Ala Mode TOTAL) and in-house developed line of business applications, on-premises Maximizer CRM, internally developed MS Excel spreadsheets, PDF tools, drawing tools, photo editing tools, on premise SAGE accounting. A key in-house appraisal system is PACT (Project Appraisal Costing Tool) which is a client/server Windows application, based on Microsoft .Net framework, approximately 20 years age. Office tools include MS 365 Suite, MS Project, MS Visio. Developer tools include MS DEVOPS and Visual Studio.
- **End-user Computing:** Laptops (Windows 10, 32GB RAM, I5 CPU), approx. 70 units HP ProBook 450 G8 & G9), 30 units Dell Latitude 5510, 10 units Lenovo P50 & P51.
- **Telephony:** On-premises Mitel 3300 PBX server, gateway server, and Micollab server, all located in the data center. SIP trunks provided by a third-party CLEC. Combination of physical Mitel handsets and softphones installed on laptops and personal cell phones. No company cell phones issued, combination of personal cell phones and Micollab used for external client communication. Internal communication is primarily Teams. No traditional bridging services utilized.
- **Cloud Applications**: Dayforce, Uplands, and Adobe DocuSign SaaS are utilized. WWW site hosted by third-party. No Azure or cloud infrastructure is currently utilized.

4. Future State IT Environment

Suncorp is developing a digital transformation strategy which includes:

- Modernization of the technology workplace;
- Implementation of cloud infrastructure for scalability, flexibility, ease of management;
- Removal of dependency on current state server and end-user device configurations; and
- Development of modern cloud-based business applications.

These main goals of Suncorp's contemplated future state IT environment are outlined below and further depicted in Section 7.

Modern Technology Workplace

- Ubiquitous implementation and adoption of the M365 suite of collaboration, communication, document management, productivity, and Office tools.

- Uniform accessibility, comprehensive security controls, and consistent end-user experience and performance at any global location with Internet service.
- Standardized cloud-based identity management services with modern authentication and integration with third-party authentication.
- Comprehensive Intune configuration and security policy management.
- Diverse end-point device accessibility, including BYOD.
- Standardized and automated operating system deployment, including OOBE, Auto-pilot capabilities with standardized device hardware.

Modern Cloud Infrastructure

- Replacement of current on-premises infrastructure (e.g., RDS environment, file/print, database, backup, Office and document tools) with cloud-based infrastructure and services, including:
    - Virtual server and serverless computing services;
    - Container orchestrator services (e.g., Kubernetes);
    - Identity, Authentication and Authorization services;
    - Databases services (e.g., Relational and NoSQL);
    - Network services (e.g., virtual network, content delivery, DNS);
    - Security services (e.g., network security, key management);
    - Storage services (e.g., object, file, block, SAN, disk);
    - Data backup and recovery services;
    - Monitoring and log analytics;
    - DevOps services;
    - Fault-tolerance, on-demand scalability, optimized resource utilization, auto-discovery communication, universal accessibility, non-stop operational updates/rollbacks; and
    - Infrastructure as Code (IaC) automated provisioning.

Modern Cloud-based Business Applications

- Replacement of current portfolio of in-house, off-the shelf, and customized spreadsheet appraisal software tools with modern containerized microservices to support a uniform, modular, web-based Software as a Service (SaaS) system, including
    - Capability to run in any computing location (e.g., cloud provider or on-premises);
    - Microservices design with back-end event bus and CORS integration;
    - Uniform single page application API front-end;
    - Domain driven design for modular independence;
    - Containerized computing cluster;
    - Data warehouse and MLOPs;
    - Universal device accessibility; and
    - Standardized, layer application architecture (application, domain model, infrastructure).

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5. Requested Information

Suncorp is conducting this RFI to identify vendor Information Technology Services capabilities in the marketplace to support its current state IT environment, provide future state cloud design and implementation services, and subsequent IT operations in a hybrid/cloud environment.

Vendors are invited to provide information on capabilities for architectural design, solution development, project implementation, and operational/managed service capabilities in connection with Suncorp's IT current state, IT future state implementation, and subsequent IT future state operations.

In consideration of the above, information submission details should include capability descriptions of the elements below:

1. **Governance:** Governance structure, guiding principles, RACI model, performance reporting mechanisms, and relationship management methodology.
2. **Strategic Alignment:** Methodology and processes to identify, implement and maintain mutual objectives, interests, synergistic strategies, technology roadmap, planning/budgeting processes, maturity assessments, benchmarking, and peer comparisons.
3. **Service Level Management**: Capabilities, structures, commitments (e.g., SLAs, SLOs), guarantees, measurement methodologies, baselining, remediation, and improvement processes.
4. **Policy:** Integrated control implementation and compliance with Suncorp, Vendor, regulator, and leading framework standards.
5. **Operational Practices:** Leading operational and service management practice (e.g., ITIL incident, problem, change, capacity, performance, configuration, service request, asset, and knowledge management).
6. **Innovation:** Opportunity analysis, value propositions, implementation strategies, benefits realization, and joint collaboration processes.
7. **Resources:** Skill sets, experience, qualifications, background checking, sourcing (e.g., partnerships), hiring practices, subcontractors, staff augmentation services, and availability planning.
8. **Service Delivery**: Framework, models, resource assignments, geographic coverage, and service evolution.
9. **Security Operations:** Automated toolsets and processes for monitoring, alerting, incident handling, remediation, reporting, and forensics. Security tool coverage (e.g., endpoint, network, firewall, SIEM, EDR/XDR, behavioral, DLP, PAM)
10. **Documentation:** Architectural, functional, low-level design, implementation instructions, standard operating procedures, system usage guides, process maps, technical diagrams, standards, documentation toolsets, maintenance process, responsibilities, and intellectual property ownership.
11. **Requirements Analysis:** Methodologies (e.g., LEAN), stakeholder solicitation, scope analysis, (e.g., LEAN), business processes, technical requirements, operational requirements, and standards (e.g., ISO 29148, BABOK, CMMI).

12. **Solution Development:** Architecture methodologies, prototyping, implementation planning, framework standards (e.g., TOGAF).
13. **Risk Management:** Assessment methodologies, prioritization, remediation techniques, monitoring, reporting, reference standards/ frameworks.
14. **Project Management:** Methodologies, applicability/scope, estimations (budget, schedule) standards (e.g., PMBOK), control processes, responsibilities, deliverable commitments, multi-vendor initiatives, scope change management, acceptance criteria, transition to operations.
15. **Procurement:** Key partnerships, manufacturer standards, pricing models, purchasing process, fulfillment channels, geographic coverage, asset management integration.
16. **Systems Management and Monitoring:** Systems management, infrastructure management, monitoring, configuration, deployment, remote control, remote management, licensing, and ownership.
17. **Service Desk:** Single point of contact, end-user (employee, executive, sub-contractor), scope of coverage, service levels, expedited support, project support, third-party vendor support and coordination, tracking and reporting.
18. **Staff Onboarding/Offboarding:** Single point of contact, automated workflow, multi-party assignments, hardware/ software provisioning/ deprovisioning, procurement, training, and education.
19. **Security Awareness and Technology Training:** Programs, tools, content, LMS, education evaluation assessment, skill path development, tracking and management.
20. **Data Backup and Recovery:** Tool sets, methodologies, policy, coverage scope, on-site, off-site, retention, recovery testing, data set optimization.
21. **Disaster Recovery:** Policies, programs, recovery design, recovery benefits, testing/training, BCP coordination, and technology solutions.
22. **Patch and Vulnerability Management**: Patching toolsets, patching coverage (e.g., Microsoft, non-Microsoft, Windows, Non-Windows, network, and peripheral devices), vulnerability management program, automated scanning toolsets, remediation, testing and policies.
23. **IT Operations and Administration:** Infrastructure and network management, platform administration, identity management, end-user computing, print/scan/copy, commodity software, SaaS, line of business software, installations, upgrades, configurations.
24. **Asset Management:** Automated tools, scanning, hardware, software, inventory tracking, IMAC coordination, on-line/off-line coverage, configuration management, image management, configuration hardening, asset lifecycle management, information asset management.
25. **Telephony:** Platforms, partnerships, carriers, on-premises / cloud (e.g., MS Phone System), design, implementation, and support processes.
26. **Data Management:** Architectural, modeling, database, governance, security, storage, operations, integration, document management, warehousing, content management, analysis tools.
27. **Artificial Intelligence / Machine Learning:** Roadmap, consulting, tools, modeling, integration, training.

28. **Cloud IT Operations**: Supported technologies, cloud providers, design, implementation, and operations of Suncorp's envisioned cloud environment (see Section 4).
29. **DEVOPS**: CI/CD, source control, repos, artifacts, environments, implementation (boards, Agile), security policy, testing, automation, containers, YAML.
30. **Reporting:** Environment health, services, operations, status, governance, security, infrastructure, KPIs, automated tools, self-service, standard contents.
31. **Cost and Fee Model:** Managed services, per unit/seat inventory, T&M, block-time, lump sum, variable, tiered structures, billing methodologies, tracking, audit, and reconciliation.
32. **Contract Agreement:** Structure, scoping, standard terms, scope change management, issue resolution.
33. **Transition Plan:** Roles/responsibilities, resource assignment, support services, risk management, disruption management, communication plan, knowledge transfer, documentation, acceptance criteria, onboarding, offboarding.

6. RFI Evaluation and Terms

Suncorp will evaluate each Vendor response and based on alignment with its current IT state and contemplated future IT state. Suncorp will be the sole judge of its best interests and all decisions set by Suncorp will be final.

Suncorp makes no implicit or explicit commitment to any subsequent procurement processes (e.g., RFP) or further service engagement or negotiation with any Vendor.

At its sole discretion, Suncorp will identify top ranked Vendors for further interview and/or presentations. Suncorp reserves the right to not disclose the identity of any top-ranked Vendor or its evaluation criteria.

The participation in this RFI by a Vendor makes no implicit or explicit obligation that a Vendor will be invited as a Proponent to a subsequent RFP. The participation is this RFI is not an offer to enter into any contract of any kind whatsoever.

Suncorp reserves the right to schedule or cancel any planned RFP process at its sole discretion. There is no implicit or explicit guarantee that the RFP will proceed.

Notwithstanding anything else in this RFI, Suncorp has the right, at any time and in its sole discretion:

1. To consider, in the evaluation of the Vendor responses, any instances of poor performance of a Vendor, or key individual, or any other unfavorable experiences with them, that any of them has experienced;
2. To change the dates, schedule, deadlines, process, and requirements described in this RFI;
3. To accept or reject any or all responses;
4. To seek clarification from Vendors who respond to this RFI;
5. To verify the validity of the information supplied in any response received;
6. To waive or modify procedural and administrative irregularities due to honest or unintentional mistakes as identified in proposals received, after discussion with the Vendor;
7. To disqualify any Vendor that does not meet the requirements of this RFI;

8. To change the limits, scope, and details of Suncorp's requirements;
9. To reissue the same RFI or a different Request for Information document in relation to Suncorp's requirements;
10. To cancel this RFI at any time for any or no reason. If cancelled, Suncorp is not responsible for any liability for costs and damages incurred by the Vendor(s); and
11. Accept any response that appears to be in the best interest of Suncorp.

This RFI document, or any portion thereof, may not be used for any purpose other than to respond to this RFI.

All RFI responses shall become property of Suncorp and will not be returned to a Vendor.

Vendors must not make any public announcement regarding participation in this RFI or any potential RFP.

All decision authority for this RFI rests with Suncorp Valuations. Suncorp is not obligated to provide any further verbal debriefing or written explanation for its decision to any unsuccessful Vendor.

All terms and conditions of this RFI are deemed to be accepted by the Vendor and incorporated by reference in their response.

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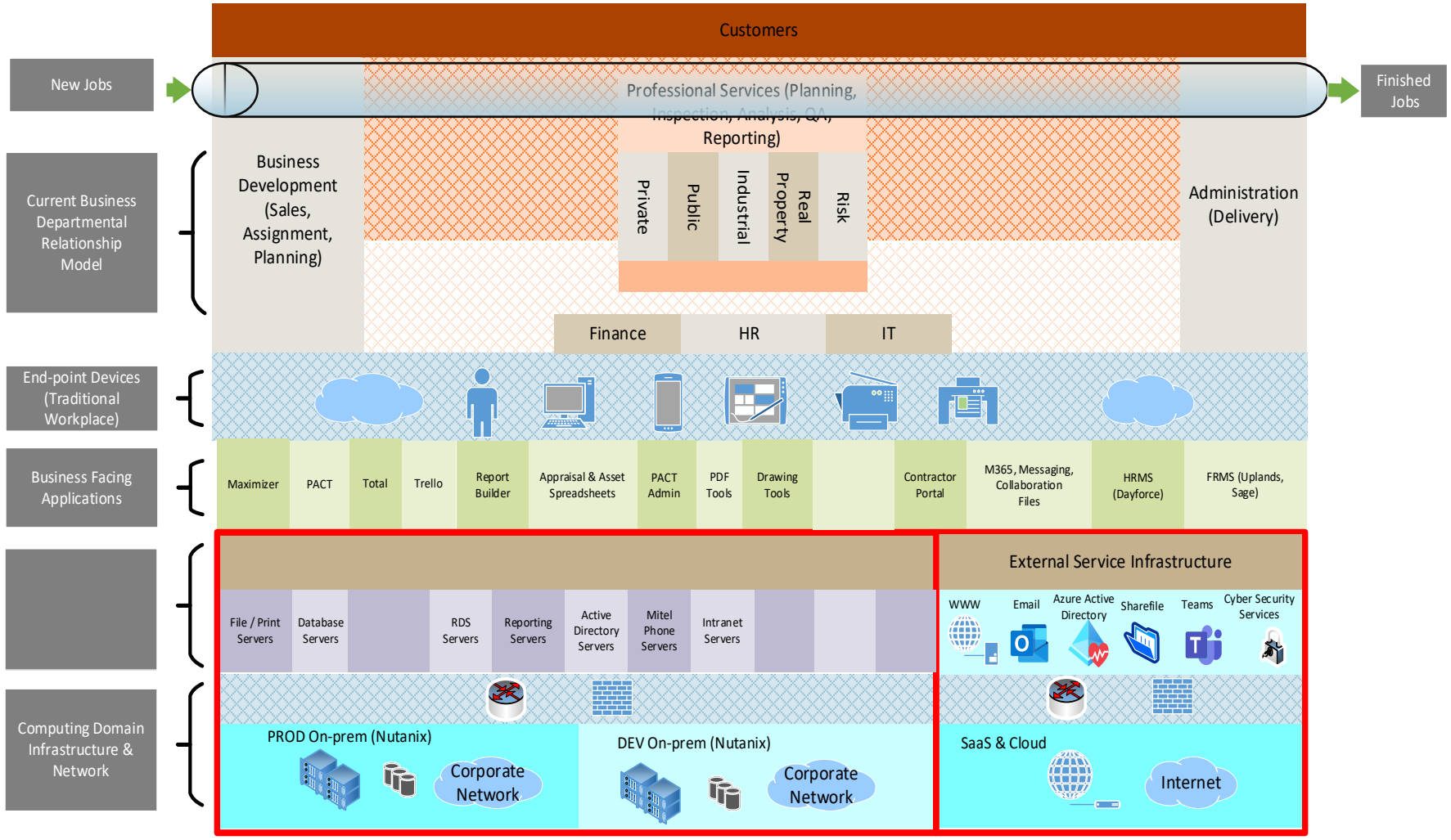
7. System Diagrams

Current State Systems Diagram:



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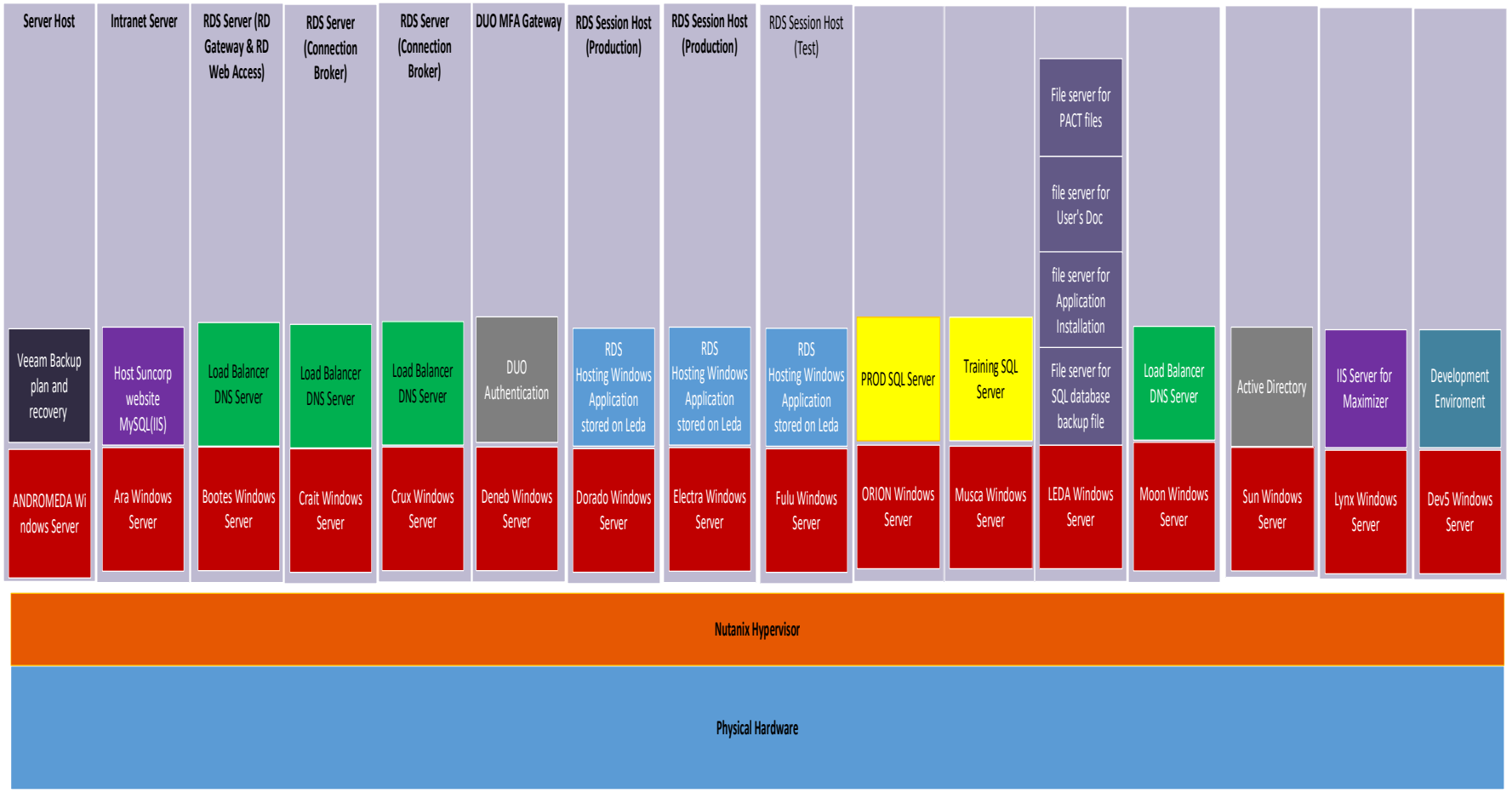
Current State Server Infrastructure:



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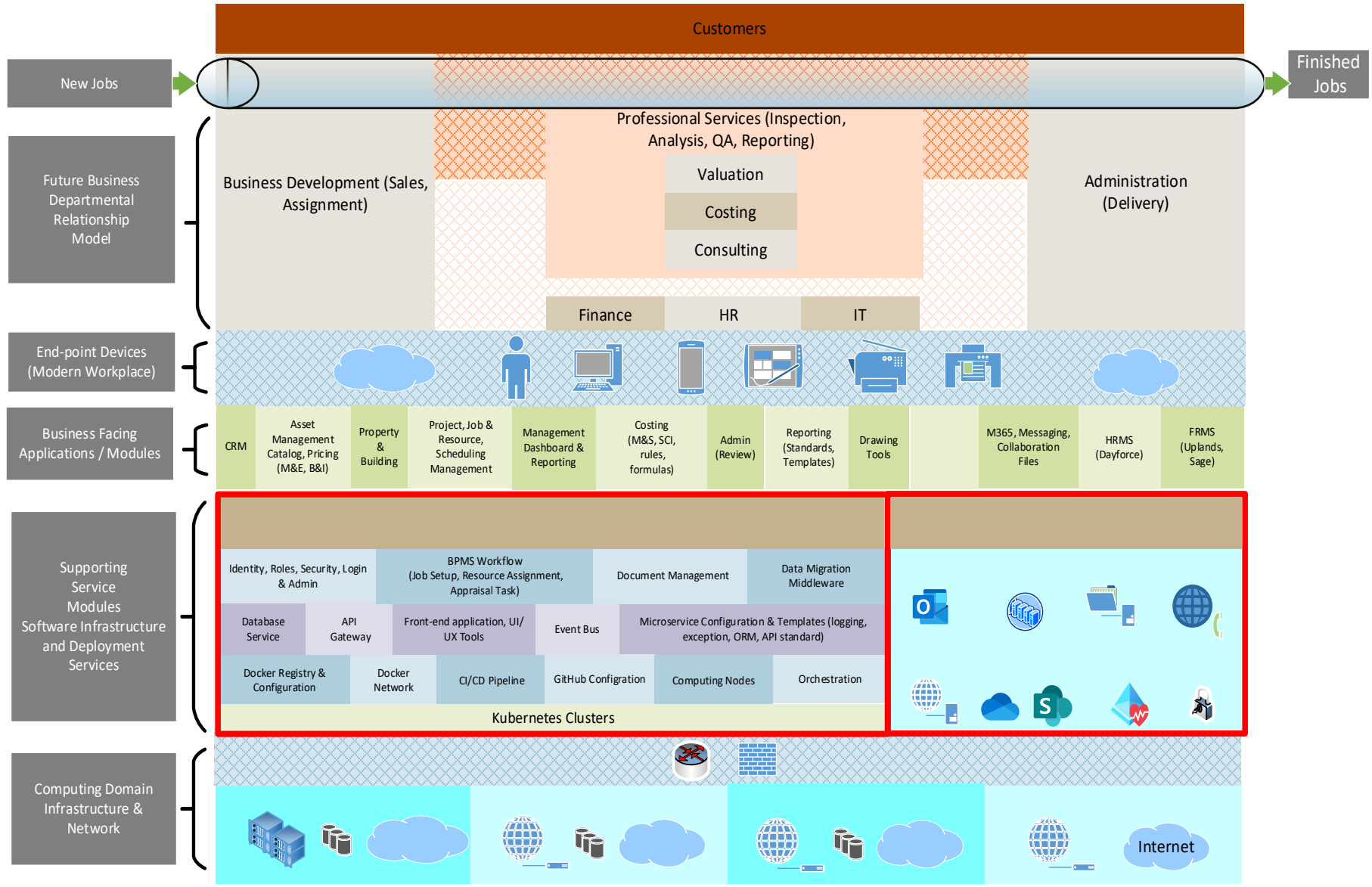
Future State Systems Diagram:



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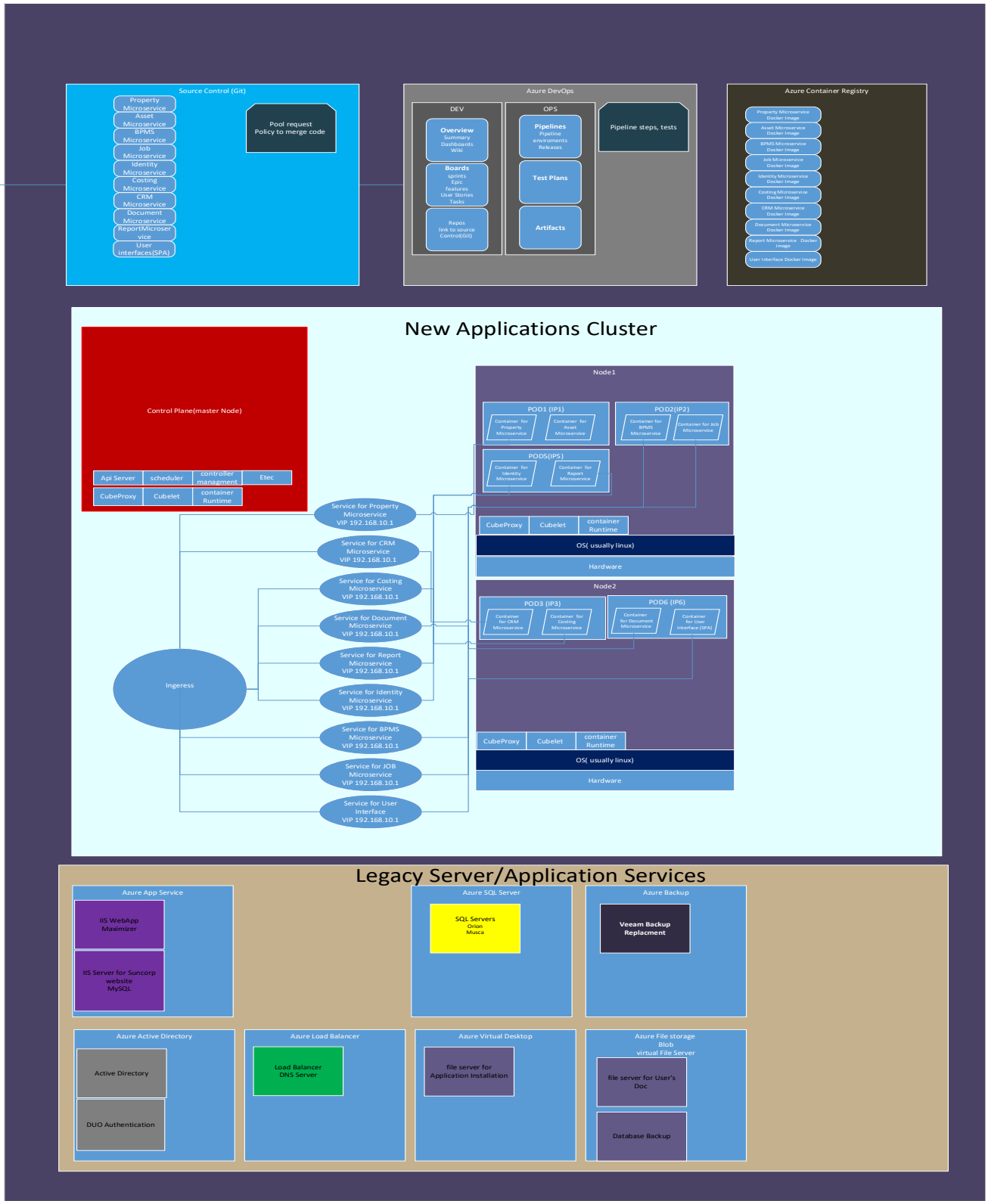
Future State Cloud Infrastructure Diagram:



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