



MANAGED IT SERVICE PROVIDER RFP

Request for Proposal for
Managed IT Service Provider
(MSP)

February 1, 2021

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CLIENT MANAGED IT SERVICE PROVIDER (MSP)

1 STATEMENT OF WORK

1.1 Purpose

The purpose of this Request for Proposal (RFP) is to invite prospective vendors to submit a proposal to supply a Managed IT Service Provider (MSP) to **SAVIO HOUSE**. The RFP provides vendors with the relevant organizational, operational, service and performance, system, and architectural requirements of services to be managed, as well as an opportunity to respond to criteria that **SAVIO HOUSE** considers significant in the process to award this contract.

Savio House is looking to contract with a MSP who is able to regular **onsite** Level 1 support to end users with the ability to travel between Savio sites on a mutually agreed upon schedule. Ability to respond to unscheduled on-site needs within 24 - 48 hours.

1.2 Coverage & Participation

The intended coverage of this RFP, and any agreement resulting from this solicitation, shall be for the use of the whole company. **SAVIO HOUSE** reserves the right to add and/or delete elements, or to change any element of the coverage and participation at any time without prior notification and without any liability or obligation of any kind or amount. **SAVIO HOUSE** further reserves the right to negotiate with any vendor based on their proposal, and to accept or reject any proposal, or modification thereto, in **SAVIO HOUSE's** sole and absolute discretion.

1.3 Description of Systems

Appendix 1 contains an outline of the reference information about **SAVIO HOUSE** IT services. While accurate in its current state, this list is subject to change and will need to be validated prior to full engagement by an MSP.

2 GENERAL INFORMATION

2.1 Original RFP Document

SAVIO HOUSE shall retain the RFP, and all related terms and conditions, exhibits, and other attachments, in original form in an archival copy. Any modification of these, in the vendor's submission, is grounds for immediate disqualification.

2.2 The Enterprise

SAVIO HOUSE is looking for a MSP to better serve the company's non-intellectual property IT needs including but not limited to maintaining computer networks (infrastructure & hardware); responding to helpdesk requests from users; and being a strategic partner for future growth, security, and resiliency.

2.3 Schedule of Events

The following is a tentative schedule that will apply to this RFP, but may change in accordance with the organization's needs or unforeseen circumstances:

Issuance of RFP	Wednesday, February 18, 2021
Technical Questions/Inquiries Due	Wednesday, February 25, 2021, end of day
RFP Closes	Wednesday, March 4, 2021, end of day
Complete Initial Evaluation	Friday, March 12, 2021
Final Award Notification	Wednesday, March 31, 2021
30-day Transition of Services	Friday, May 28, 2021
Commencement of Services	Tuesday, June 1, 2021 (Begin any initial evaluation testing)
Contract Definition and Acceptance	TBD

3 PROPOSAL PREPARATION INSTRUCTIONS

3.1 Vendor's Understanding of the RFP

In responding to this RFP, the vendor fully accepts the responsibility to understand the RFP in its entirety, and in detail, including making any inquiries to **SAVIO HOUSE** as necessary to gain such understanding. **SAVIO HOUSE** reserves the right to disqualify any vendor who demonstrates less than such understanding. Further, **SAVIO HOUSE** reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of award if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to **SAVIO HOUSE**.

3.2 Good Faith Statement

All information provided by **SAVIO HOUSE** in this RFP is offered in good faith. Individual items are subject to change at any time. **SAVIO HOUSE** makes no certification that any item is without error. **SAVIO HOUSE** is not responsible or liable for any use of the information or for any claims asserted therefrom.

3.3 Communication

Verbal communication shall not be effective unless formally confirmed in writing by the specified procurement official in charge of managing this RFP process. In no case shall verbal communication govern over written communication.

Vendors' inquiries, questions, and requests for clarification related to this RFP are to be directed in email to:

*Katy Arreola
KArreola@saviohouse.org*

Applicable terms and conditions herein shall govern communications and inquiries between **SAVIO HOUSE** and vendors as they relate to this RFP.

Informal Communications shall include, but are not limited to requests from/to vendors or vendors' representatives in any capacity, to/from any **SAVIO HOUSE** employee or representative of any kind or capacity, except for RFP Coordinator (Katy Arreola) for information, comments, speculation, etc.

Inquiries for clarifications and information that will not require addenda may be submitted verbally to the party named above at any time.

Formal Communications shall include, but are not limited to:

- Questions concerning this RFP: Questions must be submitted in writing and be received prior to February 24, 2021, end of day.
- Errors and omissions in this RFP and enhancements: Vendors shall bring to **SAVIO HOUSE** any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, vendors shall recommend to **SAVIO HOUSE** any enhancements that might be in the best interests of **SAVIO HOUSE**. These recommendations must be submitted in writing and be received prior to February 24, 2021, end of day.
- Inquiries about technical interpretations must be submitted in writing and be received prior to February 24, 2021, end of day.

- Inquiries for clarifications/information that will not require addenda may be submitted verbally to the buyer named above at any time during this process.
- Verbal and/or written presentations and pre-award negotiations under this RFP.
- Addenda to this RFP.

Addenda: **SAVIO HOUSE** will make a good-faith effort to provide a written response to each question or request for clarification that requires addenda within three business days. **SAVIO HOUSE** will respond by email to any request.

SAVIO HOUSE will not respond to any questions/requests for clarification that require addenda, if received by **SAVIO HOUSE** after February 24, 2021, end of day.

3.4 Proposal Submission

Proposals must be emailed directly to:

Savio House
Attn: Katy Arreola
KArreola@saviohouse.org

On or prior to February 24, 2021, end of day.

SAVIO HOUSE shall not accept proposals received by fax.

Vendors are to submit response in some electronic file format (PDF, Microsoft Excel, or Microsoft Word). Submissions can be a mixture of these formats.

3.5 Sales Presentation and Vendor Site Visit

After the RFP Close date and during the Initial Evaluation period, **SAVIO HOUSE** will invite successfully submitted vendors to our facilities to make a sales presentation and to answer questions by the evaluation committee. **SAVIO HOUSE** will also schedule an onsite visit to the vendor's primary site during this period.

3.6 Method of Award

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, economics, and enterprise. The purpose of this RFP is to identify those suppliers that have the interest, capability, and financial strength to supply **SAVIO HOUSE** with MSP identified in the Scope of Work.

Evaluation Criteria:

1. Capability of vendor to meet or exceed requirements set forth in Scope of Work.
2. Expressed interest in working with **SAVIO HOUSE** and ability of vendor to communicate its vision and capacity for establishing a relationship that addresses current and future needs and trends in the industry.
3. Cost to the Company, affordability of product(s), and support available from the vendor.
4. Financial stability of vendor.
5. Satisfactory responses to the information requested in this RFP.

3.7 Selection and Notification

Vendors determined by **SAVIO HOUSE** to possess the capacity to compete for this contract will be selected to move into the negotiation phase of this process. Written notification will be sent to all vendors via mail and/or confirmed email notifying them if they will move forward to the negotiation stage.

4 SCOPE OF WORK, SPECIFICATIONS & REQUIREMENTS

4.1 Service Management

1. SLA Management

- If you have an established SLA schedule, provide a copy of your SLA
- Describe the process by which formal SLA for managed services is being established.
- Describe the process by which SLA is being monitored and evaluated.
- Describe the process by which SLA is being reviewed and improved.
- For comparison purposes, what is the SLA, and describe the response for these items:
 - Reported broken keyboard, stuck key
 - Email server stops working
 - Non-critical, server problem
 - New employee setup (laptop, cube setup, monitors, docking station, keyboard, and mouse), and phone setup.

2. Service Report

- Indicate the types of service reports that are provided.
- Describe the process by which service reports are being generated and submitted.
- Indicate the types of communication channels that are provided, such as onsite meeting and conference meeting.
- How are metrics used in your organization as tools to improve overall service?

3. Added Service / Equipment process

- Indicate the process you use when added service and/or equipment is required.

4. Network Operations Center (NOC) description

- Describe your NOC center organization as it would apply to this proposal.
 - Include the staffing numbers and hours
 - Describe the level of training and experience that is typical of the first responders
- Describe your ticket management process
 - Describe how tickets are triaged
 - Describe the levels of support provided, and what are the criteria for moving a ticket from one level to the next?
 - Describe all the ways that issues can be raised to the NOC.
 - Describe how tickets received outside of normal hours are handled.
- What is the internal escalation process to Alert the next level when an issue is taking longer than expected (approaching or exceeding SLA when they exist)
- Describe your normal operating hours and available services.
- Describe your process for managing requests received during off-hours, including the triage process employed to know when to deal with issues, when needed, during off-hours.

4.2 Service Features

1. Capability of Real-Time Monitoring and Analysis

- Describe the capabilities of your real-time event and log monitoring and analysis.
- Describe the process/factor by which the capability is provided.

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2. Onsite Incident Response Support

- Describe your onsite incident response capabilities.
- Describe the process/factor by which the capability is provided.

3. Services Support Multiple Vendors' Products

- Indicate whether your service supports all items described in section 4.5 (Existing Services Requirements) with corresponding services availability.
- Describe the process/factor by which the capability is provided.

4. Support structure(s)

- Provide a guide to the significant roles in the MSP relationship with **SAVIO HOUSE**; describe the team assigned, indicating roles for technical, account management, and executives, including escalation process.

5. Additive Services and Fees

- Indicate whether your organization has additional services not requested as part of the required services. If a fee schedule is available, please provide.
- Indicate fee schedule for additional requests or per diem charges for services required after expiry of the contract.

4.3 Service Operations

1. Implementation and Configuration

- Describe the process by which services (as described in section 4.5) will be transitioned, including documentation, project management, roles and responsibilities, training/transition, installation and configuration of applications and data upload.
- Where management services will include solutions integrated to our on-premise solutions, describe the process by which the management solution is deployed. Include any tasks that must be performed on systems or devices already deployed (such as network configuration and third-party solution integration).

2. On-Going Operations

- Describe the process by which the initial configuration of your solution is updated and maintained. Include installations of patches, the update and/or modification of any rules, etc.
- Describe the process by which change requests are initiated, managed, and documented. Include request templates and process charts.
- Do you anticipate that there will be a need for any custom software development required to implement your services?
- If yes, describe the needed development effort(s) and the process by which requests, development, testing, and releases are managed.
- Describe communication process for operational updates and quarterly or annual strategic discussions.

3. Auditing and Reporting

- Describe methods for alerting and reporting on system status and methods of reporting service level agreements. If a real-time view is available through a Savio House interface to monitor SLAs and availability, provide screenshots and describe the process by which the capability is provided.

4.4 Service Support

Describe how you work with Savio Houses to deliver services and/or solutions.

1. Customer Support

- Describe the various levels of direct end user customer service that you provide and the days of the week and times of day that each level is provided.
- What method(s) do end users contact your customer support?

2. Customer Engagement style

- Describe how you interact with the Savio House company at various levels and the frequency of these encounters.

4.5 Existing Services Requirements

The following is a list of the services and requirements requested through the RFP. Please identify any changes to the existing services required as part of a response.

Appendix 1 contains a summary of existing infrastructure and factors that would impact engagement at **SAVIO HOUSE**.

1. Initial inspection of our systems and processes

- Describe the steps that you take during the Initial Inspection of our system and process, including timeline and any disruptions and probes.

2. Technology Vendor negotiations

As the MSP for **SAVIO HOUSE** the vendor will also be the negotiator for related goods and services.

- Describe your policies and processes for these types of services.
- Describe your process(es) for vetting different product offerings and comparing pricing options.
- How does the vendor interact with **SAVIO HOUSE** to assure low cost and budgetary policies are being maintained?
- Describe what existing relationships you have that will benefit **SAVIO HOUSE** in the procurement of goods and services.

3. Network infrastructure support

- Describe the ticketing system and its processes and procedures.
- Describe your experience and maintenance plans and services for Microsoft and Linux type servers.
- Describe your experience working with integrations in the Cloud, such as those for DDOS protection, CDN, etc. (Platforms like CloudFlare).
- Describe your capabilities and experience supporting network switches, firewalls, and other infrastructure devices.

4. Microsoft experience

- Describe your company's competency in managing and supporting enterprises that use the Microsoft 365 Ecosystem.
- Describe the level of experience that you have with the following Microsoft enterprise applications:
 - Microsoft SQL Server (or other databases)
 - Dynamics 365 Business Central accounting (or other accounting platforms)
 - Microsoft SharePoint
 - Microsoft Azure (or other cloud computing services)

5. Other Enterprise Applications

Describe your knowledge and experience monitoring and supporting the use of these applications, if any:

- Multifactor Authentication, SSO and User Identity verification
- Microsoft Teams (or other private corporate messaging application)
- VMWare, ESX Server, etc.

6. Provisioning Laptops and Servers

Describe your general strategy for the maintenance, provisioning and retirement of employee laptops and corporate servers. We currently use EXInventory for asset tag tracking.

7. Support capabilities for existing software, hardware, and network equipment.

Considering the list of items mentioned in Appendix 1, hardware, and software, indicate all items that would be of concern to your taking on full support, as well as those that may be handled, but would take out of your normal area of expertise.

8. Site Monitoring and Alerting Systems

Describe your strategy/strategies for monitoring and alerting as relates to production, central office servers and network infrastructure. Include a description of the key metrics being monitored and limits. (do you have a SOC?)

9. Anti-Virus/Anti-Malware management

Describe your recommended Anti-Virus/Anti-Malware solution(s).

How do you transition an organization that might have a different solution in place to your preferred system?

What are the significant benefits of the solution you are proposing?

10. Email-related services

SAVIO HOUSE uses Microsoft 365 for its email platform.

- Describe your experience using and supporting this platform.
- Describe any backup strategy(s) that you have for this product
- Describe email archiving strategy(s) that you use/recommend
- Describe your experience and recommendations for e-mail encryption
- Describe your position and experience operating and moving services to the cloud rather than physical on-premise servers

11. Business Continuity/Disaster Recovery (BCDR)

SAVIO HOUSE has implemented some BCDR, which may need to be reevaluated.

- Describe your recommended BCDR solution.
- Describe how you would integrate with and compliment a wider enterprise wide BCDR policy broader than only IT functions

12. Local User File and Data Loss Prevention

Describe the recommended method to assure that end user files, email, etc. on their local laptops are unobtrusively protected from loss, both restoring lost user data and preventing data from being exposed while being HIPAA compliant.

13. On-Site support

Describe how and at what level personnel will be on-site to respond to local issues. Include how issues requiring local intervention are addressed.

Describe if and how support for other high-tech equipment is managed, including:

- (a) Printer issues
- (b) Audio/visual devices, particularly projectors in conference rooms

Describe if and how support for ancillary systems is handled:

- (a) Access control fob distribution and management
- (b) Security camera maintenance and servicing
- (c) Laptop/computer set-up
- (d) Corporate Server room, heating, AC and UPS management

14. Level 1 Support

Describe the preferred engagement structure with **SAVIO HOUSE** as it concerns Level 1 support of our end users.

15. Expected Changes

Identify any expected changes that will be required to be implemented if you are selected as the MSP.

5 VENDOR QUALIFICATIONS & REFERENCES

All vendors must provide the following information for their proposal to be considered:

5.1 Vendor Company Information

Provide a brief outline of the vendor company and services offered, including:

- Full legal name of the company
- Year business was established
- Describe your ability to grow and scale with your customers
- Describe your insurance coverage (provide certificates as appropriate)

5.2 An outline of the managed security services currently supported, including:

- Any security certification reports that you have, such as SSAE 16 SOC 2, describing all the Trusted Service Principles that it covers, or equivalent
- Do you adhere to a security framework such as NIST 800-171 or CMMC
- Description of vendor's experience working within a regulated industry, such as healthcare, financial or other industry with compliance requirements

5.3 Corporate Strategies

Outline current and future strategies in the marketplace. What client niche's do you target and serve?

5.4 Information on current managed services clients, including:

- Total number of current Clients
- Number of clients with similar needs and managing the same security functions, and brief descriptions of those clients most like **SAVIO HOUSE**
- Distribution of clients sizes and engagement level

5.5 References:

Name and contact information for three (3) references from projects similar in industry, size, and scope, and a brief description of their implementation.

5.6 Employee Policies Information

- Describe the standard process by which you hire and screen your employees (i.e., background checks, drug testing, or similar)
- If you provide training opportunities to your employees, please describe your program(s)
- Describe certifications and any certification processes that your staff maintains.

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- What is your staffing level, and how has it been changing over last two years?
- Provide the average tenure of your service personnel.

5.7 Describe your experience working for Clients like us

- Where would **SAVIO HOUSE** fit in the distribution of companies that you service?
- How many years have you been servicing companies in our size range?
- Describe your experience working with clients in the non-profit space?

6 BUDGET & ESTIMATED PRICING

All vendors must fill out a cost breakdown for the implementation of their managed services for **SAVIO HOUSE**'s project as described in this RFP. Costs should be identified as either capital or non-capital in nature. The vendor must agree to keep these prices valid for 180 days as of June 1, 2021.

It is expected that vendor will do a comprehensive inspection of the existing systems and processes to determine areas of concern, solidify maintenance requirements, and finalize pricing model(s). Provide the cost for this inspection phase, if any, and an estimate of the ongoing pricing based on the information provided in Appendix 1. Pricing should be itemized for clarity and optional services clearly identified and priced.

As a non-profit agency, Savio House expects your most aggressive pricing

Item	QTY	Price Per	Monthly Fee
Users/PCs			
Servers			
Networks			
Switch			
Router			
Firewall			
Monthly Support			
Internet			
Microsoft Licensing			
Hosted Exchange			
Monthly Totals			

7 VENDOR CERTIFICATION

This certification attests to the vendor's awareness and agreement to the content of this RFP and all accompanying calendar schedules and provisions contained herein.

The vendor must ensure that the following certificate is duly completed and correctly executed by an authorized officer of your company.

This proposal is submitted in response to *Request for Proposal for Managed Service Provide (MSP)* issued by **SAVIO HOUSE**. The undersigned is a duly authorized officer, and hereby certifies that:

(Vendor Name, Officer Name, Officer Title)

agrees to be bound by the content of this proposal and agrees to comply with the terms, conditions, and provisions of the referenced RFP and any addenda thereto in the event of an award. Exceptions are to be noted as stated in the RFP. The proposal shall remain in effect for a period of 90 calendar days as of the Due Date of the RFP.

The undersigned further certify that their firm (check one):

- IS
- IS NOT

currently debarred, suspended, or proposed for debarment by any federal entity. The undersigned agree to notify **SAVIO HOUSE** of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Person(s) authorized to negotiate on behalf of this firm for the purposes of this RFP are:

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Signature of Authorized Officer:

Name: _____ Title: _____

Signature: _____ Date: _____

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APPENDIX 1

SAVIO HOUSE Information for MSP consideration

The list below is a guide to the current level of usage of IT Systems at **SAVIO HOUSE**. As in any active working environment, the data is subject to change without notice, but for the purpose of this RFP, it can be used as the benchmark.

1) Number of end users

- a. 160

2) Number of locations

- a. Headquarters 325 King Street, Denver, CO 80219
- b. Plus 4 home offices
 - i. 1530 W. 13th Avenue, Denver CO 80204
 - ii. 525 E. Uintah, Colorado Springs, 80903
 - iii. 14478 E. Interstate 25 Frontage Road, Suite 201, Longmont, CO 80504
- c. Currently, most staff are purely remote workers, this will change when COVID restrictions are loosened.

3) Virtual and Physical Server counts (current levels, may vary with future needs)

Production Rackspace (3 locations/server rooms, 1 remote office looking to restructure)

- Qty 7 Physical Servers (looking to downsize with transition to Sharepoint)
- Qty 3 Virtual Machines (looking to consolidate/replace with recent transition from dummy terminals to laptops for all staff)
- Headquarters at 325 King, Denver location. One server room, four buildings on-site.

Disaster Recovery and Business Continuance: (Microsoft Cloud & tape back-up)

- Tape drive system, looking to replace

4) Limited use of Cloud services due to customer audit considerations. Transitioned to Sharepoint in 2020, need to complete in 2021 and downsize network on servers.

5) Current IT Staffing

- a. Help Desk—Level One support: Bross Group
- b. Network Admin: OneNeck
- c. Development Team: Internal Management team, no onsite dedicated IT professionals.

6) Projected IT Staffing (after MSP engagement)

- a. Help Desk—Level One support: MSP to indicate optimum engagement
- b. Network Admin: MSP to provide or describe equivalent arrangement
- c. Development Team: Internal Management Team with guidance from MSP

7) Current obvious pain points or end user issues

- a. Non-tech savvy end users
- b. Aging servers and storage
- c. Aging network components
- d. Undocumented and overly complex processes
- e. Lack of sufficient knowledge of modern systems and options

8) Helpdesk tickets per month:

Tickets are a mixture of automated and manual tickets centered around the **SAVIO HOUSE** Platform. The count for general IT help desk tickets is close to 75% percent of the overall number of tickets. It is our hope that the MSP will work with **SAVIO HOUSE** to build efficient processes to take 100 percent ownership of Level One support.

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