



MANAGED INFORMATION TECHNOLOGY SERVICES

REQUEST FOR PROPOSAL

DUE DATE

July 1, 2022

By 4:30 P.M.

Inquiries and proposals should be directed to:

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3435 Liberty Drive, Springfield, IL 62704
(217) 789-0125 Ext 119
aholmgren@iacaanet.org

Illinois Association of Community Action Agencies
REQUEST FOR PROPOSAL

General Information

- 1.1 Definition: A Request for Proposal (RFP) is a method of procurement permitting discussions with responsible proposers and revisions to proposals prior to award of a contract. Proposals will be opened and evaluated in private. Award will be based on the criteria set forth herein.
- 1.2 Receipt and Handling of Proposals: Proposals shall be opened in private by Illinois Association of Community Action Agencies (IACAA) management staff to avoid disclosure of contents to competing proposers.
- 1.3 Addenda: Addenda are written instruments issued by IACAA prior to the date for receipt of proposals which modify or interpret the RFP by additions, deletions, clarifications, or corrections.

Prior to the receipt of proposals, addenda will be mailed or faxed to all who are known to have received a complete Request for Proposal.

After receipt of proposals, addenda shall be distributed only to proposers who submitted proposals; and those proposers shall be permitted to submit new proposals or to amend those submitted.

Each proposer shall ascertain prior to submitting a proposal that all addenda issued have been received and, by submission of a proposal, such act shall be taken to mean that such proposers has received all addenda, and that the proposer is familiar with the terms thereof and understands fully the contents of the addenda.

- 1.4 Discussion of Proposals: IACAA management may conduct discussions with any proposer who submits an acceptable proposal. Proposers shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals. During the course of such discussions, IACAA management shall not disclose any information derived from one proposal to another proposer. IACAA management will be comprised of the following:

Larry Dawson, President & C.E.O.
Anita Holmgren, Chief Financial Officer

During the initial discussion, the proposer shall be prepared to give an oral presentation covering the following topics:

- a. The specific services to be provided.
- b. Qualifications of the proposer, including work on similar projects, experience of personnel, etc.
- c. The working relationship to be established between the Illinois Association of Community Action Agencies and the proposer including, but not limited to, what each party should expect from the other.
- d. Implementation schedule for the project.
- e. A review of the costs associated with this project.

1.5 Evaluation Criteria:

- 1.5.1 Ability of the proposer to comply with the requirements of the contract.
- 1.5.2 The quality level of the proposed services.
- 1.5.3 The number and scope of conditions attached to the offer.
- 1.5.4 Disadvantaged business entity status
- 1.5.5 The price of the services.
- 1.5.6 Such other information that may be secured by IACAA which may have a bearing on the decision to make the award.

1.6 Negotiations: The Illinois Association of Community Action Agencies reserves the right to negotiate specifications, terms, and conditions which may be necessary or appropriate to the accomplishment of the purpose of the RFP. The Illinois Association of Community Action Agencies may require the entire proposal be made an integral part of the resulting contract. This implies that all responses, supplemental information, and other submissions provided by the proposer during discussions or negotiations will be held by the Illinois Association of Community Action Agencies as contractually binding on the successful proposer.

1.7 Confidentiality: The President & C.E.O. and Chief Financial Officer shall examine the proposals to determine the validity of any written requests for nondisclosure of trade secrets and other proprietary data identified. After award of the contract, all responses, documents, and materials submitted by the proposer pertaining to this RFP will be public information and will be made available for inspection, unless otherwise determined by the President & C.E.O. All data, documentation, and innovations developed as a result of these contractual services shall become the property of the Illinois Association of Community Action Agencies.

ILLINOIS ASSOCIATION OF COMMUNITY ACTION AGENCIES
REQUEST FOR PROPOSAL

INTRODUCTION

The Illinois Association of Community Action Agencies (IACAA) is a non-profit, state-wide membership organization servicing the Community Action Agencies throughout the State of Illinois. Community Action is the poverty fighting network established in 1964 as a part of the War on Poverty. IACAA is requesting proposals from qualified, professional technology service vendors that have experience working with non-profit clients providing on-site information technology and network support. The qualified vendor would provide necessary technical services, which would enable IACAA to:

- Ensure information technology effectiveness
- Enhance its quality of service
- Protect and secure its technology infrastructure
- Ensure the efficient operation of the Illinois Association of Community Action Agencies network and related computer systems in its defined user community
- Minimize the spending and maximize the ROI for investment in technology
- Ensure that all data and emails are backed up on a timely basis through server administration, including thorough inspections and monitoring of the two servers
- Provide maximum network uptime, including email and the Internet.

It is the general intent of the Illinois Association of Community Action Agencies that the independent consultant will perform routine maintenance and updates to the system, as well as provide a needed resource for both the end users of the system and associated management staff.

BACKGROUND INFORMATION

The Illinois Association of Community Action Agencies currently has computer hardware located at its corporate office and in the homes of some employees with 1 permanent office location and 10 virtual home offices in Springfield, Illinois. The office location is:

3435 Liberty Drive
Springfield, IL 62704

The Illinois Association of Community Action Agencies (IACAA) currently has a staff of 10 working in a variety of capacities both on-site and in the field utilizing multiple software systems and state databases. Staff positions include administrative, subsidy program, training, fiscal specialists, clerical staff, and weatherization and energy specialists. The associated technological expertise of the staff varies widely. The Illinois Association of Community Action Agencies is a private not-for-profit corporation. IACAA maintains centralized servers which house backup data, the

financial software, and other software necessary for our business operations. IACAA also requires firewall and security systems, as well as two-factor authentication security.

The Illinois Association of Community Action Agencies recognizes responsible environmental stewardship as part of its mission to provide high quality public services to its clients, residents and businesses. IACAA is committed to environmental sustainability efforts, especially in the utilization of technology to reduce energy consumption.

CURRENT TECHNOLOGY

IACAA's current technology includes a network system that includes the following:

- 2 Servers
- 8 Switches/Routers
- 24 Workstations Desktops/laptops
- 2 Network copiers/printers
- 9 Printers
- Audio/Visual Equipment to include Mondopad, speakers, iPad, drop down screens, projectors and associated controlling equipment

Prospective vendors should recognize that given the rate of change in technology, the above listing may have changed since it was developed, but it presents a baseline for this RFP.

SERVER OPERATING ENVIRONMENT

IACAA's server operating systems include:

IACAA Corporate Office

- Windows Server 2019 RC2, Quantity 2
- SonicWALL, Quantity 1
- Barracuda Backup System, Quantity 1

CURRENT SOFTWARE

IACAA supports a variety of software applications as well as numerous department-specific applications.

Graphic Design and Presentation Software

- Adobe Creative Cloud – Acrobat, InDesign, Illustrator, Photoshop

Productivity

- Microsoft Office 365 - WORD, EXCEL, POWERPOINT, PUBLISHER, TEAMS

Operations

- Abila MIP
- Zoom Video Conferencing
- LogMeIn Central
- GoToWebinar
- SmartVault

Security

- SonicWall
- Barracuda Backup systems
- End Point Antivirus

Illinois Association of Community Action Agencies staff access and require daily connectivity to a secure filing system and the STARS state database.

SOFTWARE, HARDWARE AND NETWORK MAINTENANCE AGREEMENTS

The Vendor will be responsible for ensuring all required software licensing and maintenance agreements are current. The Vendor shall assist IACAA with the contractual and procurement requirements of the maintenance agreements.

SCOPE OF WORK

The Vendor shall be responsible for performing all work outlined in the Scope of Services by providing a full range of information technology support services for IACAA's computer-based technologies system (hereinafter referred to as "System"). The nature of the service will be ongoing support and coordination of the System to ensure proper implementation of new technologies, general management and operation, maintenance/troubleshooting and to prepare for future needs, prevent technical difficulties, or down time. It is the general intent of IACAA that the vendor will provide on-site information technology staff to perform routine maintenance and updates to the System, deploy equipment and software, and provide needed resources for both end users of the System and IACAA management staff to ensure System integrity, reliability and security.

The services described in this RFP are intended to be comprehensive, but may not be

all inclusive in describing the actual particular activities that will be required, resources or other details necessary for the proper performance of the services.

The selected Vendor must provide the services described in this RFP as they evolve and may change during the contract term, through the approved change control process. This may include modifying, changing, replacing, supplementing and enhancing the services described below over time.

SCOPE LIMITATIONS

IACAA's current telephone system is generally outside the scope of this project with the exception of occasional device resetting/initialization, setting up new employees to a designated line, removing terminated employees from system, coordinating maintenance with third-party vendor and some IP space maintenance.

The Vendor will provide all support from the networking port on the copier/printer/scanner back to the users. Any hardware maintenance for copiers/printers/scanners is provided by a third-party vendor and/or warranty provisions.

During the course of this contract, the selected Vendor will identify new IT procurements and will work with IACAA management to select and obtain the required hardware, equipment and software required. In this capacity, the selected vendor will serve in a consultative and advisory role.

SCOPE OF SERVICES

The following information technology services shall be provided by the Vendor to IACAA:

- A. **Initial Assessment** – Review of the inventory, assessment of the system architecture and equipment for efficiency, capacity, speed, and current processes, and make recommendations for improving routine support criteria and eliminating emergency maintenance situations. This assessment should focus on short term, high priority issues regarding the network and the ability to support daily operations.
- B. **Desktop Application Support**—Performance of basic support functions, including the installation of PC's, laptops, printers, peripherals, and office software; diagnosis and correction of desktop application problems, configuring of PC's and laptops for standard applications; identification and correction of user hardware problems, with advanced troubleshooting as needed; update and maintain an inventory of all computer related hardware and software.
- C. **Server and Workstation Administration Services**—Manage computer network and associated hardware, software, application software, communications and operating systems necessary for the quality, security, performance, availability, recoverability and reliability of the system.

Monitor server performance and capacity management services. Ensure scheduled preventive maintenance for equipment is promptly performed; develop back-up plans and procedural documentation. The Vendor shall be responsible for configuration management, including changes, upgrades, patches, etc., management of user login's and password security; support of software products relating to servers and workstations; and timely response to repair and maintenance work for the user. Manage the two-factor authentication for all remote access and file/server security.

- D. **Network Administration Services**—Maintenance and support of network equipment, including switches, firewalls, routers, security devices, and wireless equipment are included. Install and connect printers, scanners, network devices and any other computer peripherals computer devices. Analyze routine configuration changes and install software patches and upgrades as well as minor cabling if needed. Design alert notification system to designated IACAA personnel in the event of failure. Complete proactive monitoring of network equipment including bandwidth utilization, and other performance indicators, with reporting when specified thresholds are reached. Oversee network performance and capacity management services, and network troubleshooting. Maintain network documentation and procedures.
- E. **Telecommunications**—Coordinates with telephone system vendors to ensure optimal phone system performance. Sets up phone system with new employees. Coordinates purchases of cell phones for designated IACAA employees.
- F. **Email**—The Vendor shall manage IACAA's email account and ensure domain name is properly established and maintained. The Vendor shall be responsible for adding, deleting or changing employee email accounts of IACAA employees and ensure that each email account is working efficiently and effectively free of uninterrupted errors, and ensure that each individual email account can maintain ample server space so that employees may store several years of email data. An email account notification shall be established for reporting IT maintenance problems or needed support.
- G. **Security, Backup Efforts and Website and Internet**—The Vendor shall ensure that all IACAA servers, desktops and laptops are protected by antivirus software and that an adequate firewall is in place to prevent unwanted intrusion into IACAA's computer network system. Systems shall be designed to notify IACAA employees when system securities are breached and or when system hardware in not operating efficiently. The Vendor shall perform security audits as requested and notify IACAA personnel immediately of suspected breach of security or instruction detection. Backup system shall be established to prevent loss of data and functionality. The Vendor shall configure the IACAA system to enable remote access in a secure environment. The Vendor shall provide support and maintenance

service for IACAA's website and Internet services.

- H. **Training**—Trains new employees on IT equipment, phone system, email system, filing system, network, remote access and any relevant software.
- I. **Strategic Planning**—The Vendor shall engineer, plan and design services for major system enhancements, including installations and upgrades of new and existing systems. Examples include major server upgrade, storage system upgrades, redesign of backup systems, etc. Provide technical leadership for server technology issues. Make recommendations for future purchases of hardware, software and technology needs. Install new servers, software and hardware and transfer data when acquired. Strategic planning, design and installation/upgrade of core network systems. Examples include major network up-grades; provide changes, IP schema design, installation of core network devices, etc.
- J. **On Demand Response**—The Vendor shall offer on-demand response to IACAA's IT requests. The Vendor shall have access and be available 24/7 but particularly during IACAA's normal business hours (8:30 a.m. and 5:00 p.m.). The Vendor will also be required to perform maintenance service after hours and on weekends in situations which would least likely disrupt IACAA staff during regular business hours. The Vendor will be expected to guarantee a 4-hour response time for emergency situations and high priority requests from IACAA management.
- K. **Management Reporting** – The Vendor shall provide IACAA management a monthly invoice which shall include a comprehensive listing of all services performed and the time spent performing each of the listed services. Services performed on a particular employee's desktop, laptop or software should indicate the employee's name as well as the work performed. This invoice must be received by IACAA no later than the 5th day of the following month.
- L. **Confidentiality**—Confidentiality of computer information and data is vital. The selected Vendor and their employees will be required to sign and adhere to a confidentiality clause that information in the system must remain confidential under penalty of law. The Vendor also agrees that IACAA may perform a criminal background investigation on any Vendor employees who have access to IACAA's system and the Vendor will provide requested employee information when requested by IACAA.
- M. **Miscellaneous**—The Vendor will be permitted to perform some routine procedures remotely however; the Vendor will be expected to perform on-site visits both for routine preventative maintenance and on-demand response (when that allows for effective problem resolution and associated response time). All on-demand requests will be coordinated through IACAA management.

Not Included—The contract to be awarded does not obligate IACAA to purchase computer equipment, hardware devices, cabling, licenses, software; etc. from the

successful Vendor. Replacement parts are not part of this contract. The scope also does not include computer equipment and networks not owned by IACAA.

SUBMISSION REQUIREMENTS

IACAA is requesting that the proposal submitted address the subjects with specificity. We are looking for content, organized effort, and solution-oriented procedures. The goal is a secure, smooth operating, efficient process, and effective informational technology system.

Due to the nature of this proposal, it is requested that each proposal be targeted and focused on how your organization can best meet IACAA's requirements. It is our expectation that vendor proposals will present a comprehensive and professional solution to our information technology needs. Finalist vendors will have an opportunity to provide a more detailed explanation of their services during the short list evaluation process. Each proposal shall provide the following information in the order as listed:

Letter of Transmittal—The letter of transmittal is not intended to be a summary of the proposal itself. The letter of transmittal must contain the following statement and information:

1. Company name, address, phone number(s) and website.
2. Name, title, email address and phone number of the person to contact and who is authorized to represent the vendor and to whom correspondence should be directed.
3. Federal and State taxpayer identification number of the Vendor.
4. A brief statement of your understanding of the services to be performed and make a positive commitment to provide services as specified.
5. Letter must be signed by a corporate officer or person authorized to bind the Vendor to the proposal and cost schedule.
6. A statement indicating that the proposal and cost schedule will be valid and binding for ninety (90) days following the proposal due date, and will become part of the contract negotiated with IACAA.
7. An indication if the Vendor meets the requirements of the Small Business Administration and Minority Business Development Agency of the Department of Commerce. This must be supported by documentation.

Profile—Provide a short profile of the firm including at a minimum the following:

1. Length of time in business.
2. Length of time in providing proposed managed services
3. Number of clients
4. Number of clients in the non-profit sector.
5. Number of full-time and part-time employees and areas of involvement; i.e., technical support, administrative support, etc.
6. Location of office to service IACAA account.
7. Please provide a resume of the Project Director and any full and part employees that will be servicing the account, including any relevant certifications.

Proposal

1. Describe the overall approach the Vendor will use in providing the services required and the methodology for providing on-going support.
2. Describe how your firm is positioned to provide the services listed above and provide a history of experiences on providing similar services.
3. Provide the name, title, address and phone numbers of at least 2 clients, preferably nonprofits, you have worked with in the past three (3) years. Also include information referencing the actual services performed, number of users, and length of tenure.
4. Describe the approach to conduct the Initial Assessment (A) and the anticipated deliverable
5. Describe Desktop Application Support (B) services in general and specific questions to address:
 - Incident reporting process
 - Support availability (days of week and time)
 - Structure of charges for support
 - Steps for resolving problem escalation
 - Final authority regarding conflicts
 - Response time and goal for resolving problems
6. Describe Managed Services Solution for the following:
 - Server and Workstation Administration Services (C)
 - Network Administration Services (D)
 - Telecommunications (E)
 - Email (F)
 - Security, Backup Efforts and IACAA and ICADC Websites and Internet (G)
 - Training (H)
7. Describe the proposed approach for providing Strategic Planning Services (I) as described in the RFP.
8. Describe the proposed approach for providing the On-Demand Response (J) services.
9. Describe the proposed Service Level Metrics by service delivery category and proposed management reporting to IACAA Management
10. Explanation of any contract termination for default or other incident in the past five years. Termination for default is defined as notice to stop services for non- performance or poor performance, and issue was either litigated or not litigated. If default occurred, list name, address, and telephone number of the party. If NO such termination occurred for default, declare it. IACAA will evaluate the facts, and may, at its sole discretion, reject the vendor's proposal.
11. Scope of services beyond the RFP that the vendor provides which may be of interest to IACAA.
12. Describe knowledge and experience with the software identified in Current Software section.

13. Proposal summary, including why the vendor is pursuing the work and how it is uniquely qualified to perform the services. Include other pertinent information that helps IACAA determine Vendor's overall qualifications.
14. The Vendor shall submit service reports on a regular basis, summarizing service and IT policy issues. The vendor must be available to meet with IACAA President & C.E.O. and Chief Financial Officer to review reports and discuss issues.

EVALUATION CRITERIA AND PROCESS

IACAA management will review the vendors' qualifications. From this review, an evaluation and selection process will be completed using the following criteria as a benchmark for making a recommendation. Following are the criteria:

| CRITERIA | POINTS |
|--|---------------|
| Nonprofit Experience | 20 |
| Project approach | 20 |
| Understanding of services to be provided | 15 |
| Project staffing | 15 |
| Minority or female owned organization (provide | 5 |
| Satisfaction of clients and end users | 5 |
| Proposal presentation (clarity & creativity) | 5 |
| Pricing | 15 |
| Total Points | 100 |

The selection process is as follows:

1. Reviews qualifications, experience, references, approach and personnel etc.
2. Scoring of the proposals.
3. Short list vendors and schedule interviews.
4. Recommendation to IACAA's board for approval of a contract to the vendor whose approach and pricing best meets IACAA's needs.

RFP TIMELINE

| EVENT | DATE |
|-------------------------------|----------------------------------|
| RFP Issued | May 20, 2022 |
| RFPs Due | July 1, 2022 by 4:30 P.M. |
| Interviews (Shortlist) | July 7, 2022 |
| Contract Award | July 22, 2022 |
| Start Date | August 1, 2022 |

SUBMISSION OF PROPOSAL

Proposals must be received by 4:30 P.M. on July 1, 2022 via email to aholmgren@iacaanet.org. Questions must be received 5 days prior to the closing of the RFPs and emailed to aholmgren@iacaanet.org. A response in the form of an addendum will be issued.

The pricing sheet should provide an hourly rate for services requested. If multiple hourly rates are proposed, please indicate the types of services for each rate. If the pricing structure includes any discount payment plan, please provide the details of this proposal. Detailed supporting cost data will facilitate the evaluation process. Relevant assumptions used to develop the cost data should also be provided.

The preferred method of submittal is in electronic format through email. Please send emails to: aholmgren@iacaanet.org. Please submit two (2) copies of the proposal, if physical copies are submitted. All copies of the physical proposals must be submitted in a sealed envelope and addressed as follows:

**Illinois Association of Community Action Agencies
Ms. Anita Holmgren, Chief Financial Officer
3435 Liberty Drive
Springfield, IL 62704**

This Proposal is an offer which shall be considered accepted only after the IACAA President & C.E.O. authorizes the execution of the contract. In the event that this Proposal is accepted and an award of contract is made, the Vendor does hereby agree to deliver to IACAA the signed and executed contract within ten (10) working days after the date of such acceptance and notification thereof.

The proposal shall be binding for sixty (60) days following the bid opening date unless the Vendor, upon request of IACAA agrees to an extension.

This proposal, when accepted and signed by an authorized signatory of IACAA, shall become a contract binding upon the person, partnership, or corporation to perform as specified and upon IACAA to accept the associated services.