

Issue Date: August 22, 2012
Response Due Date: September 21, 2012

1. Introduction

The Chicago Public Education Fund (The Fund) is a not-for-profit 501(c)(3) organization that seeks to accelerate achievement for all Chicago Public School students by building teams of talented principals and teachers. Using an innovative venture philanthropy model, The Fund serves as a catalyst and strategic investment partner to businesses, foundations, civic and community leaders, and the Chicago Public Schools in supporting high-impact programs that improve school leadership and student achievement district-wide. For further information, please see our web site at <http://www.thefundchicago.org/>.

2. RFP Objective

The Fund currently outsources the management of its information technology infrastructure and applications to an outside vendor. As part of its ongoing efforts to ensure the alignment of information technology to its core mission, The Fund is conducting a review of its current technical services and support and will, as a result of the RFP process, select a fully outsourced IT management provider to deliver proactive maintenance, support, and other IT related functions.

3. Environment Overview

The Fund operates from one location, a high rise office building in downtown Chicago at 200 W. Adams, Suite 2150, Chicago, IL 60606. The number of employees ranges between approximately 10 and 20, including part-time workers and interns, all of whom have either desktops or laptops and network access. There are three servers, two managed switches, an internal fire wall, a phone PBX, and voice mail server located on site. Back-ups are done to DLT tapes.

The primary systems/applications within The Fund's network are:

Operating system:	Windows 7
Desktop software:	MS Office 2007 Professional
Accounting software:	Blackbaud Financial Edge (3 concurrent licenses)
Fundraising software:	Blackbaud Raiser's Edge (4 concurrent licenses)
Email remote access:	Outlook Web Access (Mailstreet)
Network remote access:	VPN (formerly GoToMyPC)
Phone system:	Avaya VOIP
Wireless access:	Cisco Small Business
Internet access:	Cogent 100 mbps
Web site:	Site server and content maintained by GeelPak

4. Services Required

- Initial Assessment – Compile/update inventory of all information technology related assets; assess system architecture and current processes; make recommendations for improved system performance.
- Network Administration Services – Scope of activity covers all of The Fund's network equipment including switches, firewalls, routers, phone PBX, and other security devices. Installation of new and maintenance of existing printers, network copiers/scanners, etc. Maintenance including regular analysis, routine configuration changes, and installation of patches and upgrades. It also includes network performance and capacity management services, and network troubleshooting, as well as maintenance of up-to-date network documentation and procedures.
- Server Administration Services – Manage computer systems and networks to include all application, database, messaging, and voicemail servers and associated hardware as well as software, communications, and operating systems necessary for the quality, security, performance, availability, recoverability, and reliability of the system. Ensure scheduled data back-ups, including off-site storage, and preventive maintenance for equipment are properly and promptly performed; maintain the maintenance records on the equipment; develop new or revise existing operations, administrative, and quality assurance back-up plans and procedural documentation. Setup new users and edit or remove existing users on the servers. Configuration management, including changes, upgrades, patches, etc., for Blackbaud software and other specialized software products used by The Fund as it relates to the server(s) and associated hardware. Management of user logins and security. Coordinate repair and

maintenance work with outside repair vendors and ensure repairs are conducted in a timely and cost-efficient fashion.

- Desktop Applications Support – Perform basic support functions including installing PCs, laptops, PDAs, printers, peripherals, and office automation software; diagnose and correct desktop application problems; configure laptops and desktops for standard applications and identify and correct end-user hardware problems; and perform advanced troubleshooting. Maintain an up-to-date inventory of The Fund’s computer related hardware and make available to The Fund personnel upon request. Assist designated Fund personnel with software and hardware purchases. Assist in development of IT and software/hardware policies and procedures.
- Security – Maintain current virus detection programs on The Fund’s servers, email, and all other computers and laptops. Perform security audits and notify The Fund personnel immediately of suspected breaches of security or intrusion detection. Configure the system to enable remote access in a secure environment and provide remote access administration as requested by designated Fund personnel.
- Strategic Planning – Engineer, plan, and design services for system enhancements, including installations and upgrades of new or existing systems. Examples include server upgrades, storage system upgrades, redesign of backup systems, etc. Provide technical leadership for server technology issues. Make recommendations for future purchasing 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 upgrades, provider changes, installation of “core” network devices, etc. Where outside vendors are recommended to accomplish these projects, oversee their work and coordinate with The Fund personnel to ensure timely and effective implementations.

5. Submittal Requirements

Please include the following information in your RFP submittal:

- Cover Letter
 - a. Company name, address, and telephone number(s)
 - b. Name, title, address, e-mail address, and telephone number of the person or persons to contact
 - c. Briefly state your understanding of the services to be performed and make a positive commitment to provide the services as specified
 - d. Summarize your proposal and your firm’s qualifications

- e. Statement that indicates the proposal and cost schedule will be valid and binding for ninety (90) days following proposal due date and will become part of the contract that is negotiated with The Fund.

- General Vendor Information

- a. Length of time in business providing proposed services
- b. Total number of clients
- c. Total number of not-for-profit sector clients
- d. Number of full-time equivalent personnel in:
 - i. Consulting
 - ii. Installation and training
 - iii. Sales, marketing, and administrative support
 - iv. Other (specify)
- e. Location of headquarters and any field offices
- f. Location of office that would service this account
- g. Describe how your firm is positioned to provide the services listed above and detail your history in providing similar services
- h. Describe your approach to providing these services and your methodology for providing ongoing support
- i. Staff Resources – Identify names of principals and key personnel who will actually provide the information technology services. Summarize the experience and technological expertise of these staff. Describe the role and responsibilities that each of these individuals will have. The local availability of staff that will be providing these services should be an important consideration.
- j. Support Services – Please answer the following:
 - i. If help desk support is available, please indicate the hours.
(Indicate XX a.m. to XX p.m. in Central Time and the days of the week.)
 - ii. How are support requests documented and tracked?
 - iii. Do you provide a toll-free support number?
 - iv. Please describe your problem escalation process, including:
 - 1. Initial problem identification (hand-off from help desk)
 - 2. Triage for priority and severity of problem
 - 3. Steps for resolving problem escalation when a solution is not forthcoming or an implemented solution is unsatisfactory
 - v. Indicate your response time and goal and also your statistics regarding meeting that goal.
- k. References – Provide the name, title, address and telephone number of three references for clients to whom you have provided similar services. Please include information referencing the actual services provided, customer size (number of users), and length of tenure providing services to this client

- l. Statement of Material Litigation – Provide a statement on whether or not the company is currently involved with any litigation material to providing IT services, arbitration or bankruptcy proceedings, or has been with the past three years, directly or indirectly.
- m. Cost of Services – The Fund strongly prefers a fee arrangement that provides for an all-inclusive fixed monthly rate for services covered under this agreement. Please provide your proposed fee schedule, including hourly rates for major projects that fall outside the scope of this agreement. We would consider a major project to include events such as relocation of the physical office space, or migration to a different operating system, other than an upgrade of the current operating system. Please provide characteristics of other types of projects you would consider to fall outside a fixed monthly fee. Also define any additional charges (e.g., travel expenses).

6. Submission of Proposals

Proposals should be delivered or mailed to:

Chicago Public Education Fund
Attention: Julia Mellow, Chief Financial Officer
200 W Adams, Suite 2150
Chicago, IL 60606

All proposals must be received by September 21, 2012.

7. Selection Criteria and Process

The criteria used to evaluate RFP submissions will include experience and expertise, references, overall methodology, resources, and cost. Evaluation is expected to be completed within 30 days after receipt. The Fund may ask to arrange interviews with the top companies, or may request additional information, to assist in making the final selection.

Questions regarding this proposal should be submitted to:

Julia Mellow, Chief Financial Officer
jmellow@thefundchicago.org
312-558-4524