



## **CATHOLIC CHARITIES** of the Archdiocese of Miami, Inc.

### **Request for Proposal:**

**Catholic Charities of the Archdiocese of Miami, Inc. is accepting proposals until May 20th, 2016 for IT managed services.**

#### **Objective**

Catholic Charities of the Archdiocese of Miami, Inc. (CCADM) is desirous of entering into a business relationship with an IT Service Provider. This agreement will define the relationship between an IT Service Provider and CCADM. The agreement will clarify the responsibilities between the IT Service Provider and CCADM and provide a framework and a common understanding for both parties. Ultimately this agreement will be most effective when an IT Service Provider is selected and both parties collaborate on what should be included in a final document. The executed contract will become the guideline for managing the relationship between CCADM and the IT Service Provider.

CCADM is seeking comprehensive managed infrastructure and network services. The proposal will be to provide hardware (server, desktop/laptop), network, and software support and monitoring, help-desk, back-ups, remote access and on-site support, email maintenance and support, inventory control and management (hardware and software), security, and disaster recovery. The selected vendor must be able to work effectively with other vendors (such as proprietary software vendors and internet service providers) to make the managed services a seamless process to the end user. It is also expected that the selected vendor will assist management with long-term planning to keep systems current and functional in the most cost-effective manner possible. Additionally, they will work with CCADM staff to develop and implement a day-to-day tracking and prioritization system for work order requests.

#### **Organization Description**

CCADM provides human and social services in Miami-Dade, Broward and Monroe Counties, currently employs 308 employees during 9 months of the year and 180 employees during the 3 summer months. Employees have access to management information systems at 15 locations in the tri-county area. The current inventory of desktops, laptops and servers at these locations is approximately 327.

#### **RFP Timeline**

CCADM intends to finalize the vendor selection process according to the following schedule. Any changes in this schedule will be at the sole discretion of CCADM.

- April 25<sup>th</sup>, 2016 RFP made available
- May 20<sup>th</sup>, 2016 Proposals due
- June 10<sup>th</sup>, 2016 Decision and selection of vendor
- June 17<sup>th</sup>, 2016 Scope of Work Award

## Proposal Requirements

Vendor's proposal in response to this RFP will be incorporated into the final agreement between CCADM and the selected Vendor. The submitted proposals are required to include each of the following sections:

1. Executive Summary
2. Approach and Methodology
  - 2.1 Help Desk
  - 2.2 Server Management
  - 2.3 Infrastructure Management
  - 2.4 Third-Party Vendor Management
  - 2.5 Disaster Recovery
  - 2.6 Inventory Management
  - 2.7 Strategic Development
3. Management Deliverables and Reports
4. Detailed and Itemized Pricing
  - 4.1 Pricing Model
  - 4.2 Services - Included
  - 4.3 Services - Excluded
  - 4.4 Training
5. Appendix: References
6. Appendix: Project Team Staffing
7. Appendix: Company Overview

The detailed requirements for each of the above-mentioned sections are outlined as follows.

### 1. **Executive Summary**

This section will present a one-page high-level synopsis of the Vendor's responses to the RFP. The Executive Summary should be a brief overview of the engagement, and should identify the main features and benefits of the proposed work.

### 2. **Approach and Methodology**

Proposer must respond to each task/deliverable in the Scope of Work section and include:

- The Proposer's overall support strategy/philosophy
- The approach Proposer will take to carry out the work objective
- An explanation of the problem reporting and resolution process that describes the Proposer's support plan, including tiers, service levels, call escalation, the person(s) authorized to close problem reports, etc.
- Your company's onboarding plan?
- Explain your process for handling special requests or projects from your clients.
- Your proposal should address all of the following:
  - o Server Support
  - o Network Support
  - o Process for liaison with 3<sup>rd</sup> party vendors and service providers
  - o Security of Equipment and Data
  - o Support for Disaster Recovery Plan
- Our hours of operation are primarily 8:00 a.m. to 5:00 p.m. Monday through Friday. However, describe the support model for all hours of operation.
  - o What are the options for emergency support?
  - o Is your support model all-inclusive? If not, what is not included?
  - o Who is responsible for managing, monitoring and responding to systems?

## **2.1 Help Desk**

### **Tasks**

- Provide Incident Management and Service Request processing via phone and email.
- Route Helpdesk tickets, as appropriate.
- Coordinate escalation of tickets.
- Perform hardware and software troubleshooting, and assign to 3<sup>rd</sup> party resolver in accordance with Customer's agreements with such 3<sup>rd</sup> party providers.
- Coordinate onsite remediation when necessary.
- Perform user account management.
- Prioritize, monitor and document incidents and requests.
- Utilize remote view and remote control capabilities to assist in incident resolution.
- Provide Web portal access to enable viewing status of Helpdesk Incidents.

### **Supported Systems**

#### **Hardware**

- Dell desktops
- Laptops
- Printers and scanners
  - o 23 networked copiers for printing, scanning and faxing.
  - o 2 printers that are directly connected to PCs
  - o 3 stand-alone desktop/portable scanners

#### **Software**

##### **Operating Systems**

- Windows XP Professional
- Windows 7 Professional
- Windows 8.1
- Windows 10

CCADM locations utilize various third party mandated software to meet their specific needs. These systems are cloud hosted with various forms of connectivity methods. Proposer is responsible for supporting installation and/or connectivity issues on these systems. A partial list of these systems follows;

- Miami Jewish Health System
- CIRTIS
- HMIS
- Datatracker/SAMIS
- MRIS
- ACMS
- KIS Express
- UAC Portal
- FSFN
- Galileo
- ChildPlus
- eDeca2
- Teaching Strategies

## Help Desk Metrics

SLA is measured in business hours and business days.

Priority	Response SLA	Resolution SLA	Description
Urgent	15 Mins	8 Hours	This is a critical condition that significantly restricts the use of an application or system to perform any critical business function. This could mean that several programs or departments are affected.
High	1 Hour	2 Days	The reported issue may severely restrict use of an application or system. This could mean that a single department or user is impacted.
Medium	48 Hours	5 Days	The reported issue may restrict the use of one or more features of the system, but the business impact is not severe.
Low	72 Hours	10 Days	The reported anomaly in the system does not substantially restrict the use of one or more features of the product to perform necessary business functions.

### Additional Questions

- What is your average speed of answering customer calls to your call center?
- What is your target metric for answering calls within that time frame?
- What is your average talk time per call?
- Is there a limit to the number of Help Desk calls per month?
- What are the help desk hours? If they do not cover our hours of operations, please describe what coverage will be provided for those hours outside of your help desk hours.
- Who can call the help desk?
- Is help desk staff local? If not, where are they located?
- What is your average response time for urgent, high, medium, and low priority incidents?
- What is the average problem resolution time for urgent, high, medium, and low priority incidents?
- Are help desk staff employees of your company or subcontracted?
- Are help desk staff full-time?
- What is the skill/certification level of first-level help desk staff?
- What happens if the help desk cannot resolve the problem?

## 2.2 Server Management

### Tasks

- Monitoring and maintaining Windows Server Update Services with latest applicable updates.
- Remediation of server or service failure.
- Coordinate onsite remediation when necessary.
- Maintain Active Directory synchronization using ADFS and AD synch to specified hosted services.
- Perform security management for appropriate network resource access.

## Supported Systems

### Hardware

- 2 Dell VMWare servers running 6 servers
- 1 Netgear NAS
- 12 Windows RODC servers
- 1 stand-alone server

### Software

- All servers installed with Windows Server 2008 R2 Standard operating system
- Servers providing services for single CCADM domain:
  - o Active Directory
  - o DHCP
  - o DNS
  - o WSUS
  - o ADFS
  - o AD Sync
  - o File/Print services
  - o HP LiveVault
  - o Veeam

## Server Management Metrics

SLA is measured in business hours and business days

Priority	Response SLA	Resolution SLA	Description
Urgent	15 Mins	8 Hours	This is a critical condition that significantly restricts the use of an application, service, or server to perform any critical business function. This could mean that several programs or departments are affected.
High	1 Hour	2 Days	The reported issue may severely restrict use of a device or service. This could mean that a single department or user is impacted but the overall network and servers are functioning.
Medium	48 Hours	5 Days	The reported issue may restrict the use of one or more features of the system, but the business impact is not severe.
Low	72 Hours	10 Days	The reported anomaly in the system does not substantially restrict the use of one or more features of the product to perform necessary business functions.

## 2.2 Infrastructure Management

### Tasks

- Provide Incident Management and Service Request processing via phone and email.
- Route Helpdesk tickets, as appropriate.
- Coordinate escalation of tickets.
- Perform hardware and software troubleshooting, and assign to 3<sup>rd</sup> party resolver in accordance with Customer's agreements with such 3<sup>rd</sup> party providers.
- Coordinate onsite remediation when necessary.

## Supported Systems

### Hardware

Proposer will support internal connectivity and external connectivity to 3rd party voice and data services provider, including;

- Cabling
- Switches
- WIFI

## Infrastructure Management Metrics

SLA is measured in business hours and business days

Priority	Response SLA	Resolution SLA	Description
Urgent	15 Mins	8 Hours	This is a critical condition that significantly restricts the use of the network and performing critical business functions. This could mean that several programs or departments are affected.
High	1 Hour	2 Days	The reported issue may severely restrict use of the network. This could mean that a single department or user is impacted but the overall network and servers are functioning.
Medium	48 Hours	5 Days	The reported issue may restrict the use of one or more features of the system, but the business impact is not severe.
Low	72 Hours	10 Days	The reported anomaly in the system does not substantially restrict the product in performing necessary business functions.

## 2.3 Third-Party Vendor Management

### Tasks

- Liaison and interface with Equipment and Hosted Services vendors
- Liaison and interface with Cloud Services vendors
- Refer or escalate Help Desk and other service requests to the appropriate 3<sup>rd</sup> party, and performing liaison duties to ensure request completion.

## Supported Systems

### Hardware

- Windstream
  - o AllWorx phone system
  - o Hosted firewall
  - o Managed WIFI
  - o Voice and Internet service provider
- Ultimate
  - o Time clocks
- Canon
  - o 23 network connected copiers
- CrossMatch
  - o Biometric scanner
  - o LiveScan Management software

## Software

- Microsoft Office365
  - o SharePoint
  - o Exchange
  - o Mobile Device Management
- Social Solutions-Efforts to Outcomes (ETO)
- Consumer database
- CIP Reporting
- Incident Reporting System
- Abila Nonprofit Online
- MIP Fund Accounting
- Microix Workflow Modules
- Ultimate Software - Ultipro
- MyLearningPointe
- HP LiveVault

## **2.4 Disaster Recovery**

### **Tasks**

- Management of backup software
- Performing and monitoring data backup
- Work with CCADM management to ensure that strategies and procedures are in place to support disaster recovery of business critical systems.
- Support Disaster Recovery Plan.

### **Supported Systems**

#### Software

- Veeam
- HP LiveVault

### **Disaster Recovery Metrics**

SLA measured in business hours and business days

<b>Priority</b>	<b>Response SLA</b>	<b>Resolution SLA</b>	<b>Description</b>
Urgent	15 Mins	8 Hours	This is a critical condition that significantly restricts the use of an application, device or system to perform any critical business function. This could mean that several programs or departments are affected.
High	1 Hour	2 Days	The reported issue may severely restrict use application, device or system. This could mean that a single department or user is impacted.
Medium	48 Hours	5 Days	The reported issue may restrict the use of one or more features of the system, but the business impact is not severe.
Low	72 Hours	10 Days	The reported anomaly in the system does not substantially restrict the use of one or more features of the product to perform necessary business functions.

## **2.5 Asset Management**

### **Tasks**

- Maintain IT inventory and document asset changes.
- Manage software licensing and renewals.
- Perform data sanitization on hard drives as part of the disposal process.
- Dispose of obsolete equipment and defective IT assets.
- Maintain record of third-party vendor contracts and expirations.

### **Supported Systems**

#### Hardware Assets

- Servers
- Desktops
- Laptops & Surface devices

## **2.7 Strategic Development**

### **Tasks**

- Assist CCADM management with long-term planning to align systems with business strategy.
- Provide innovation and leadership in analyzing emerging technologies to determine practicality and strategic value to support the organization's goals and objectives.
- Work with CCADM stakeholders to define business and systems requirements for new technology implementations.
- Maintain system functionality in the most cost-effective manner possible.

## **3. Management Deliverables and Reports**

### **Tasks**

- Provide monthly reports on metrics.
- Provide quarterly face-to-face onsite reviews of service deliverables.
- Analyze Help Desk metrics for SLA and possible proactive measures to reduce request volume

Include attached to the RFP examples of any reports currently used to summarize metrics in the following areas:

- o Help Desk
- o Server Management
- o Infrastructure Management
- o Disaster Recovery

## **4. Itemized Pricing**

Include a fee breakdown based on your pricing model.

- a. What is the pricing model? Fixed fee, hourly rate, hybrid, or other?
- b. What services are included in the pricing? Address specifically the following (please include any additional items not included in this list):
  - Help-desk support
  - After hours support
  - Travel time
  - Vendor management
  - Regular in-person business review and reporting
  - Response to major system problems or outages



- c. What services are not included in the pricing? Address specifically the following (please include any additional items not included in this list):
- On-site time
  - Hardware installation
  - Software installation
  - Infrastructure changes
  - Specific server management tasks
- d. Is training provided? Is it included in the pricing, or costed separately? If separately, please provide cost information and describe the type of training you provide.

**5. Appendix: References**

Provide three current corporate references for which you perform similar work. At least one of the references should be comparable to CCADM in size and requirements.

**6. Appendix: Staffing**

Include biographies and relevant experience of key staff and management personnel. Describe the qualifications and relevant experience of the types of staff that would be assigned to this project by providing biographies for those staff members.

Please describe bonding process and coverage levels of employees. Affirm that no employees working on the engagement have ever been convicted of a felony.

**7. Appendix: Company Overview**

Provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, address, main telephone number, toll-free numbers, and fax numbers.
- Key contact name, title, address (if different from above address), direct telephone and email address.
- Person authorized to contractually bind the organization for any proposal against this RFP.
- Brief history, including year established and number of years your company has been offering managed services and/or applications support.
- What kind of insurance coverage does the company have? Please include a copy of your current certificate of insurance.
- Your plan for ensuring compliance with the information security standards. Also describe your experience working within HIPAA, CIPA, and other information security standards compliance environments.
- What are the terms for canceling the support relationship? How much notice is required?
- What are your key differentiators?
- Disclosure of any actual or potential conflicts of interest and any pending lawsuits.

## **Selection Criteria**

CCADM will be using a competitive bid process to award a contract to the successful vendor. Although cost is a significant criterion for selection, the award will be based upon responses provided in the RFP.

RFP's for multi-year service contracts (i.e. 1-3 years or 1-5 years) will be awarded additional points in the scoring criteria. CCADM reserves the right to:

- Reject any or all responses to the RFP and discontinue this process without obligation or liability,
- Accept other than the lowest priced offer and,
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers.

Evaluation will be based upon the Vendor's responses provided in the RFP. The ability of the vendor to meet the needs specified in the RFP and the total price quoted for all items covered by the RFP.

## **Proposal Submission**

Proposals are to be submitted electronically in MS Word, MS Excel or Adobe PDF formats only. **All proposals must be submitted electronically in MS Word, MS Excel or Adobe PDF formats only by 4:00pm on Friday, May 20<sup>th</sup>, 2016.** Proposals received after the specified due date will not be considered. Vendors must submit proposals to [mis@ccadm.org](mailto:mis@ccadm.org).

## **Presentation/Interview**

CCADM may ask a Proposer to come in for a presentation or interview.

**All inquiries regarding this request for proposal should be directed to:**

**Iani Carvalho**  
*Senior Director of Information Technology*  
1505 NE 26<sup>th</sup> Street  
Wilton Manors, FL 33305  
(954) 315-2606  
[mis@ccadm.org](mailto:mis@ccadm.org)