IT Managed Services – REQUEST FOR PROPOSAL

ISSUED DATE: 2-16-2023

CONTACT:
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1   ***Request for Proposal (RFP)***

Pathway, Inc. (Pathway) invites you to respond to this Request for Proposal (RFP). The focus of the RFP is to select a single organization to provide IT managed services to Pathway over a 1 year period, beginning on May 1, 2023, and ending no later than May 31, 2024. Following the initial term there is a possibility to renew this contract for an additional term(s).

2   ***Introduction to Pathway, Inc.***

Pathway is the designate Community Action Agency for Lucas County and employs around 75 employees, including full-time, part-time, limited term, and seasonal. Pathway operations include financial assistance for electric, rent, utilities, water, home repairs for seniors, fatherhood programs, employment and career services, financial literacy education and more in service of Lucas County.

3   ***Overview of Current Pathway IT Environment***
- Who oversees the environment?

    The Administration Office oversees the IT functions for Pathway with assistance from our IT Sevices Vendor and department managers.

- How many users?

    We have approximately 75 active users, ~100 mailboxes in Gmail and ~75 users in our Mitel phone system.

- How many locations do users work from?

    Pathway at the Hamilton Building in Toledo is the primary location, OH and sometimes remotely.

- Do users work remotely?

    Yes.

- How many PC's and laptops?

    88 active workstations, 40 User Laptops, 22 Macbooks, 18 Laptops used for BU Program, 30 Classroom Laptops and 25 Laptops for pop up classrooms. 87 active phones,

- How many mobile devices?
  20-40 devices, fluctuates on Department budget and needs. (Verizon is our current mobile phone vendor.)

- How Many Desk Phones

  100 Shortel Desk Phones

- Is it a PC environment?

  This is a PC environment, with one dept. using Apple devices for their operations.

- How many servers?

  There are 4 Physical Windows Servers with 4 Virtual Servers

- Where are those servers located?

  Servers are located at the Pathway network closets at the Hamilton Building in Toledo, OH. The current vendor is responsible for backup drives to remote/ off site location.

- Explain the network environment.

  The floors of Pathway are connected over a fiber backbone with 10GB managed Ubiquiti switches with One MDF and 3 IDF's a total of twelve (12) 48 port switches, and 5 aggregation switches. The network is a Windows network with most of the servers in the server room are in a controlled environment. There are 14 Ubiquiti Access points throughout the building. There are a few Vlan's for network segregation and for phone traffic.

  The phone system is managed by current vendor and is a ShoreTel system. This phone system is equipped with multiple workgroups and call back features users and changes would be included in the scope of work

Most of the managed servers are virtual using Hyper-V

- What is the backup process?

  The Windows servers are located on premise. Most of the servers are virtual, and those servers are backed up both locally and across networks with drives being maintained by the current vendor. Drives are swapped daily and moved to off site location

- How current is the hardware and software?
Workstations are varied throughout the building but Operating Systems are most up to date Windows 10. Apps are most supported versions of what was purchased with license: Adobe 2020, Office 2016, Mitel Connect.

- Are there any ad hoc or custom solutions that have been implemented that a vendor should be aware of?

Pathway uses common industry hardware and software but has specific implementations made to the Mitel phone systems, as well as specific setups for each department's needs and equipment (printers, scanners, etc.). Pathway also uses Microsoft Dynamics SL for their accounting purposes.

4   *Value Added Service Requirements*
As part of this RFP, the following services are the current priority items for Pathway:

- **24 x7x365 Onsite and Remote Support Services**

Telephone based and remote support via software agent
Helpdesk service hours, 8:30 a.m. to 5:00 p.m., Monday – Friday, 8:30 a.m. to 5:00 p.m.

A Technician is currently onsite (Monday – Friday) at the Pathway Building during normal business Hours
Onsite support and travel time
After Hours and Emergency Support

- **Project Planning & Implementation Services**

Project planning and needs development with Department Managers and Pathway IT Committee
Project implementation services, including (but not limited to):
>   New server installations and current server upgrades/migration Department new PC refresh installations
>   Server and software installation for 3rd party vendors
>   New firewall/router configurations and installations
>   Current vendor orders, set up, and installs hardware for us

- **Proactive PC/Workstation Management and Monitoring**

Service desk (Automatic/Proactive Management of Incidents)
Preventive Maintenance & Security – Windows Updates
Preventive Maintenance & Security – Software Updates (Adobe, Java, etc.)

Hardware & Software Optimization (dis defrag, clear temp files, etc.) Malware & anti-virus software protection monitoring and management
Rapid problem resolution
PC systems documentation and performance reporting
Provides individual cybersecurity training as needed

- **Proactive Server Management and Monitoring**

  Monitoring and management of critical shared storage
  Service desk (Automatic/Proactive Management of Incidents)
  Preventive Maintenance & Security – Windows Updates
  Preventive Maintenance & Security – Software Updates (Adobe, Java, etc.)
  Automated Hardware & Software Optimization (disk defrag, clear temp files, etc.)
  Monitoring and management of system backup jobs
  Installation, configuration, and management of Server software
  Adds/moves/changes to server domain users
  Active/Retired Asset Audit and Reporting
  Server systems documentation and performance reporting
  Malware & anti-virus software protection monitoring and management

- **Proactive Network & Firewall Management and Monitoring**

  Monitoring and management of critical Sophos firewall and Ubiquiti Network
  Equipment and Access Points
  Review of firewall security protocols and VPN access
  Firewall software upgrades
  Configuration of secured VPN access for remote users and to outside systems
  Segregation of networks and systems as required for enhanced security
  Ensuring appropriate security protocols and access methods for all wireless access
  points Configuration and maintenance of network switches and other network
  infrastructure Firewall configuration changes and updates

- **Proactive Environment Management and Administration**

  Annual Technology Budget creation in conjunction with Department Managers and IT
  Committee
  Management of technical vendor relationships and vendor communication
  Asset management and tracking of in-service schedule for network and PC hardware
  Assistance to Department Managers and IT Committee for cost effective and time
  efficient procurement of hardware and software
  Assistance to the IT Committee for development of a comprehensive Disaster Recovery
  Plan

- **Mobile Device management**

Maintain devices setup and configure maintain lines and interact with Mobile vendor

- **Human Resource support**
Work with human resource department for employee management, ID cards, and equipment distribution

- **Misc. Support**
Setup and tear down of Meeting room equipment for events and meetings, maintain misc. document and promotional material for department, maintain Copiers and printers

5 **Selection Criteria**

Pathway will use multiple criteria to select the most appropriate partner. Respondents are encouraged to be as aggressive and creative as possible in their proposals. The following list summarizes the major qualitative areas that will be evaluated, along with their overall weighting.

- Industry expertise and experience
- Demonstrated customer service quality and support
- Previous relevant experience
- Vendor strength and stability
- Account management
- Reporting capabilities
- Financial considerations

6 **Response Contents and Format**
Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Your response to this RFP will serve as the basis for the consideration of your potential as a partner.

7 **Information Requirements**
For the purposes of understanding more about your company and your ability to successfully fulfill this important Pathway requirement, please provide the information below as part of your response, clearly referencing each specific question.

7.1 **Corporate Information**
1. Give a brief overview of your organization's involvement in providing IT value added services in the marketplace.
2. How long has the organization been in this business and what is your current market share?
3. In what cities do you maintain offices?

4. Indicate the number of employees in your organization. How many of those are dedicated to account management and/or technical support?
5. How many are full-time vs. contract?
6. What differentiates your organization from your competitors in the marketplace and how will this be relevant to us?
7. Will you subcontract any components of the proposed solution to third-party organizations? If so, please describe the components to be subcontracted and provide details of any agreement in place with the subcontracted firm/individuals as well as a summary of past work that you have successfully completed together.
8. Please provide details of three current customer accounts that are similar in scope and requirements to those of Pathway.
9. List any Community Action Agencies you currently do business with or have done business with in the past.

7.2 Proposed Approach and Solution

1. Please provide a proposed work plan for a migration to your organization as a Pathway preferred vendor. Specifically, provide the following information:
   i. Key activities
   ii. Timing
   iii. Information/resource requirements from Pathway
   iv. Deliverables
   v. Key milestones, checkpoints, and other decision points
2. If we elect to move forward with your organization, what Pathway resources would you require (e.g., information, data, staff resources, communication) during migration and on an ongoing basis?
3. Please identify the team that will be assigned to the account and describe how you plan to interact with us and any third-party providers that may provide services to Pathway
4. Please describe your experience in providing the following value-added services:
   a. Technology Roadmap
   b. Solution design
   c. Network and email system monitoring
   d. Remote backup
   e. On-demand Technology Training
   f. Managed Cyber Security
   g. Procurement management
   h. Technical support, including remote user support
   i. Reporting and communication
   j. IT policy review and development
   k. Implementation planning and guidance
   l. PC deployment
   m. On-site implementation of business applications
   n. Asset inventory management
5. Please describe your experience in providing server technology and service for your customers, focusing on planning, implementation, and ongoing support.

6. Can you provide specific examples of how you have worked with customers that began with significant technology limitations and helped to successfully transform them into organizations with well planned and executed technology strategies? What were the critical success factors in this transformation?

7. How can we be confident that hardware pricing levels will be aggressive and will remain highly competitive over a multi-year period during which new models may be introduced?

7.3   *Support*

1. Describe fully your technical support options including the assistance request process, escalation process, support hours, response times, staffing levels, staff expertise, and physical location of the help desk.

2. What options are available for user training and technical training that may be required by our staff?

3. Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.

4. Pathway user base varies considerably in its level of technical sophistication. Please describe your experience in successfully supporting users that may be remote and possess limited technology skills.

7.4   *Financials*

1. Describe the pricing model(s) that you typically employ for your standard services.

2. Please indicate the charges associated with each of the following services, including the key driver of each cost and whether it is included in a standard per-unit cost vs. charged on an ad hoc basis.
   - Technology Roadmap
   - Solution design
   - Network and email system monitoring
   - Remote backup
   - On-demand Technology Training
   - Managed Cyber Security
   - Procurement management
   - Technical support, including remote user support
   - Reporting and communication
   - IT policy review and development
   - Implementation planning and guidance
   - PC deployment
   - On-site implementation of business applications
   - Asset inventory management
   - Software licensing control

3. Do you offer service bundles and if so, describe the effect of this bundling on pricing?

8   Communications and Response

Jay Black, Jr., Pathway's CEO, is the designated point of contact for this initiative. For any information relative to this RFP, please direct all inquiries to his contact information is as follows:

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Jay Black, Jr.
Pathway, Inc. CEO
(419) 242-7304
kclark@pathwaytoledo.org

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9   Notification of Intent to Respond and Clarification Questions

Please indicate your intention to respond, by email, to the above email address by the *Intent to Respond and Questions Due* date outlined in the *Key Dates* table below. In addition, please provide the contact details of the individual responsible for coordinating your RFP response. At the same time, we ask that you submit any clarification questions regarding the RFP. Answers will be provided to all respondents by the *Answers Provided* date.

10   Response Delivery Instructions

Please submit an electronic copy of your proposal to the email address indicated in the *Communications and Response* section above.

11   Vendor Presentations

Our intention is to hold presentations/demonstrations with one or more firms on the *Presentations* dates indicated in the *Key Dates* table below. We will endeavor to provide the successful firms with as much advance notice as possible.

12.   Key Dates

Event	RFP Issued	Intent to Respond and Questions Due	Answers Provided	Proposals Due	Presentations
Date	02/16/2023	03/15/2023	03/31/2023	04/07/2023	04/14/2023
Time	10:00 a.m.	4:00 p.m.	4:30 p.m.	4:00 p.m.	1:00 p.m. if needed

13   No Obligation

The submission of a proposal shall not in any manner obligate Pathway to enter a contract or to be responsible for the costs incurred by your organization in responding to this request. Pathway reserves the right to reject any proposals in its sole discretion, and to negotiate the terms of the contract, including the contract amount, with the selected respondent(s) prior to entering a contract. If none of the proposals are deemed acceptable, Pathway reserves the right to seek additional proposals after the proposal date. The successful respondent will be

required to comply with all Equal Opportunity laws and regulations as well as other federal, state, and local regulations.

14   Agreement of Non-Disclosure

This document is considered proprietary and shall not be disclosed to any other party. It is designed, developed, and submitted to potential partners of Pathway solely for the benefit of Pathway.

15   No Guarantee

Pathway makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.