FREY FOUNDATION

Managed Service Provider Request for Proposal

RFP COORDINATOR:

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1. Introduction

The Frey Foundation (Foundation) is pleased to invite you to respond to this Request for Proposal (RFP) for Managed IT Services. This RFP intends to solicit responses and formal proposals from qualified Managed IT Services Providers (MSPs) and select a single organization to provide IT services to the Foundation.

1.1 About the Frey Foundation

The Frey Foundation was established in 1974 out of a deep love of community and commitment to philanthropy. Since then, the Foundation has continued its legacy, working to enhance the lives of children and families, protect natural resources, promote the arts, and build community.

Our Mission:

Investing collaboratively in West & Northern Michigan to create a better place to live by strengthening its communities, protecting its natural environment, enhancing the arts, and transforming the lives of individuals and families.

Our Values:

We encourage creativity while expecting excellence and accountability in ourselves and others.

1.2 Purpose

With this RFP, the Frey Foundation is requesting information about your company and the IT products and solutions you provide as outlined in the Service Requirements section. This information will be gathered from several different organizations and used to evaluate provider options for the Foundation.

This RFP is issued solely for information and planning purposes. This document does not commit the Frey Foundation to contract for any service, supply, or subscription whatsoever. The Foundation will not reimburse any information or administrative costs incurred due to participation in response to the RFP. All costs associated with the response will solely reside at the responding party's expense.

1.3 Confidentiality Statement

All information included in this RFP is considered confidential and intended only for use by responders. No information contained in this document or discussions related to the Frey Foundation MSP selection effort may be disclosed to another party or used for any other purpose without express written or verbal consent.

1.4 Reservations

This RFP is subject to revision, including all dates, and may be amended by addenda to this RFP.

2. Environment Overview

The information below outlines the general demographics of the Frey Foundation and our current technological environment.

Office Location:

Downtown Grand Rapids
40 Pearl St NW, Suite 1100
Grand Rapids, MI 49503

Number of Employees: 6

Current Technical Environment:

- **Core Hardware**
    - 2 on-premises virtual hosts
    - 6 on-premises servers

- 1 router
  - 4 network devices
- **Software Systems**
  - Microsoft Office 365 Suite
  - Barracuda email security and backup
  - 1 domain
- **Connectivity**
  - Comcast
- **Remote Access / VPN**
  - Watchguard Mobile VPN
- **Applications**
  - (On-premises) Dynamics GP – IT supported by Maner Costerisan
  - (Cloud) SmartSimple – IT supported by Re-Solved/Gen3
  - Clickshare Present
- **Backups, Antivirus, and Remote Support Software**
  - SafeVault backup
  - Webroot SecureAnywhere
  - ScreenConnect Client
  - Netwrix Auditor
- **Workstations and Other Devices**
  - 6 desktop workstations
  - 5 laptops
  - 1 iPad
  - 3 Crestron touch screens with Microsoft Teams
  - 1 BrightSign media player

3. Service Requirements

As part of this RFP, the Foundation has requirements for the following services. We realize that not every MSP will be able to provide all the services listed below, but we encourage you to respond regardless.

- **Help Desk Support –** The MSP should offer superior 24x7x365 Help Desk support from Tier One to Three services utilizing industry best practice processes and procedures.
- **Server & Network System Monitoring** – The MSP must provide 24x7 monitoring of Frey Foundation's server & network system with proactive communication and escalation protocols based on the severity of any unscheduled outages.
- **Patch Management Services & Preventative Maintenance** – The MSP must provide management of critical security and system patches to all servers and systems on the network to ensure the Foundation's IT systems and resources are appropriately managed and maintained.
- **Business Continuity and Disaster Recovery –** The MSP must support the Foundation's ability to recover based on the Recovery Time Objective (RTO), and Recovery Point Objective (RPO) agreed

upon by organizational constituents. In addition, backup and redundancy are needed to support this need.

- **Remote Backup** – The MSP must execute a nightly backup plan for the critical servers, including a regularly-tested recovery process.

- **Email System Management** – The Frey Foundation requires the management and administration of the Foundation's email system for all users.

- **Antivirus, AntiSpam & Antispyware Protection** – The Frey Foundation is looking for solutions to defend against security threats, including phishing, malware, spam, viruses.

- **On-Site Support –** When needed, the MSP should have the ability to deploy on-site resources to assist in issues that cannot be resolved through remote access to in-house systems.

- **Networking Support** – The Frey Foundation requires proactive management and monitoring of our switches, firewalls, routers and Wi-Fi systems, and other networking equipment as identified by the Foundation.

- **Security Systems Monitoring –** MSP must provide proactive monitoring and management of the Foundation's security systems, including firewalls, intrusion prevention, secure remote access, and any implementations of advanced security solutions the Foundation may utilize.

- **Vendor Management –** The MSP should manage other vendors that may be contracted for by the Foundation and serve as the key point of contact unless escalated.

- **Warranty and Asset Inventory Management** – The Frey Foundation expects the MSP to maintain hardware and asset inventory that includes Desktops, Laptops, Servers, Printers/Scanners, and notify the Foundation of any potential service or warranty issues. The MSP must also assist with managing the lifecycle of the Foundation's devices and maintain an equipment inventory to ensure our systems are always current.

- **Software Licensing Control** – The MSP must provide oversight of the automatic renewal of software applications and maintenance of appropriate documentation.

- **Procurement Management** – The MSP must assist with selecting commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.

- **PC Deployment** – The MSP should provide delivery and setup of machines on-site.

- **Desktop and Laptop Support –** MSPs must include their ability to support existing and future desktop and laptop hardware, including maintenance and repair, the replacement of failed equipment, and the acquisition and provisioning of new equipment as needed.

- **Printers, Copiers, and Scanners –** The MSP must be able to support existing printers, copiers, and scanner-related network-printing issues.

- **Desktop Software Standardization and Software Licensing and Upgrades –** MSP must have a process for identifying standardization and management of desktop images and ensuring that staff is using current products as well as current OS and browser versions.

- **Lifecycle Management of Hardware Units** – The MSP should have end-of-life notification, replacement, and asset decommissioning/disposal processes.

- **Break Fixes and Installation** – The MSP should offer planned and on-call break/fix services, including emergency response to server issues.

- **Move, Add, Change (MAC)** – Frey Foundation is looking for the MSP to help with any changes to the location, the configuration of existing equipment or software, and the installation of additional equipment or software as needed.

- **Reporting –** The MSP should provide relevant reporting based on their performance from a help desk perspective and system health, uptime, and assist in keeping an accurate hardware inventory to inform ongoing planning of maintenance, warranties, and refresh schedules.

- **Technology Strategy Planning** – The MSP will work with current IT staff to develop a long-term strategic technology plan. The plan will take advantage of new and existing technologies to produce a pragmatic and practical future roadmap that enables the organization to fulfill its overall mandate in the community.

- **Account Management –** The MSP must offer an internal escalation process in tandem with Frey Foundation to ensure the ability to have multiple contact points available if needed depending on the items or issue encountered.

- **Project Management –** The MSP should offer project management and technical engineering resources to assist with technical projects as identified by the MSP or Frey Foundation.

- **Solution Design** – The MSP must provide solution packages (e.g., hardware, software, licensing) and associated data consolidation.

- **Service Levels –** The MSP should identify service level agreements or objectives and report back regularly to Frey Foundation on their ability to meet these agreements or objectives.

- **IT Policy Review and Development** – The MSP should assist in the development of customized policies related to the use of technology.

- **Hosting –** The MSP should offer services relative to hosting or co-location of equipment, either directly or through partners.

- **Onboarding and Offboarding Staff –** The MSP must have a process and procedure to onboard or offboard team members in a timely and efficient manner.

- **Compliance –** The MSP should support rules and regulations as provided by relevant governing organizations as identified by regulatory or grant-based requirements.

- **Scalability –** The MSP must offer a model where scaling up or down from a system and cost perspective is nimble and straightforward.

- **Multi-Factor Authentication (MFA) –** MSP must provide and manage a Multi-Factor Authentication (MFA) solution to provide an easy-to-use method to verify user identities at login and protect logins with multi-factor authentication.

- **End-User Security Awareness Training –** The MSP should offer Security Awareness Training to teach the Foundation's staff and employees about current threats, terms, standards, and compliance to help them avoid a security incident.

- **Vulnerability Testing –** The MSP should offer vulnerability tests internally and externally to determine what flaws and potential threats exist from the outside, or perimeter, of Frey Foundation's business network.

- **Managed SOC-as-a-Service –** The MSP should offer Managed SOC-as-a-Service to monitor the Foundation's environment and ensure proactive detection and response to threats, intrusions, and attacks.

- **Special Projects –** MSP must provide services to migrate current Foundation file shares to Sharepoint and OneDrive. The MSP should also offer services relative to the completion of additional special projects as determined by the Foundation and MSP.

4. Response Process

4.1 Notification of Intent to Respond and Clarifying Questions

Please indicate your intention to respond to this RFP by email to the Primary RFP Contact listed below no later than **5:00 p.m. on Friday, August 27, 2021**. 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.

4.2 Primary RFP Contact

Please direct all inquiries regarding this RFP to:

> Sarah Hockin-Mix
> Program & Accounting Associate
> contact@freyfdn.org
> (616) 451-0303

4.3 Response Delivery Instructions

The Frey Foundation requires responses to this request for proposal to be delivered in writing. You may attach documentation to support your answers, if necessary.

Please submit all responses via email no later than **5:00 p.m. on Friday, September 3, 2021,** to:

> Frey Foundation
> Attn: Ken Long
> contact@freyfdn.org
> (616) 451-0303

Any response received after the delivery date specified will not be considered without prior written or electronic approval.

Please answer the attached questions (Attachment A and Attachment B) and provide a proposal document, a pricing breakdown, and a version of any master services agreement or other contracts that would be utilized if chosen.

5. Selection Criteria & Process

5.1 Selection Criteria

The Foundation will evaluate the responses based on multiple criteria and will select the best overall solution to fit its needs. The Foundation is not obligated to choose the lowest-priced bidder. All responses will be evaluated in the following areas:

- Completeness of solution

- Expertise and experience

- Demonstrated customer service quality and support

- Previous relevant experience

- Vendor strength and stability

- Account management capacity

- Reporting capabilities

- Financial considerations

5.2 Selection Process

All responses will be evaluated as received and included in the following process:

- Review and scoring of the responses and clarification of information as deemed necessary by the evaluation team.

- Identification of 2–3 final candidates to conduct an in-depth review of capabilities, including on-site interviews and presentations.

- Conducting of site visits and reference calls as deemed appropriate by the evaluation team.

5.3 Finalist Presentations

We intend to hold presentations/demonstrations with one or more firms as indicated in the *Key Dates* table. the Frey Foundation will host the presentations at our office at **40 Pearl St NW, Suite 1100, Grand Rapids, MI 49503**, and we will try to provide the finalist firms with as much advance notice as possible.

6. Key Dates

Below is a general timeline outlining the process steps with estimated dates for each step of the process. By participating in the RFP process, MSPs agree that they can adhere to the following general timeline and the meeting times they reserve through this process.

Task	Date
RFP Distributed to MSPs	Friday, August 6, 2021
Notification of Intent to Respond	Friday, August 27, 2021
Responses Due from MSPs	Friday, September 3, 2021
Response Analysis / Finalists Selection	Wednesday, September 8, 2021
Finalist Presentations	Monday, September 20– Friday, September 24, 2021
MSP Selection / Award Contract	Monday, October 4, 2021
MSP "Go Live"	Saturday, January 1, 2022

Thank You

The Frey Foundation looks forward to reviewing your response and would like to thank you in advance for your participation. The Managed Service Provider selection project is very important to our continued success and represents a major focus of effort for the Foundation. We appreciate and value your input, expertise, and feedback.

Attachment A

RFP Response: Corporate Information

Please provide the following information about your company.

Company Profile

1.   Company Name

2.   Company Address

3.   Contact Information

4.   Company Webpage

5.   Main Products / Services

6.   Main Market / Customers

7.   Number of years in the Market

8.   When did you first start providing similar solutions?

9.   Company location(s)

10.   Number of Employees

11.   Number of Employees in Account Management

12.   Number of Employees in Technical Support

13.   Notable Acquisitions

14.   Key Business Partnerships

Financial Information

1.   Previous year gross revenue

2.   Previous year net income

3.   Return on investment

Attachment B

RFP Response: Questions

Please provide the following information about your company.

General

1. What are the general types of organizations your clients represent?

2. Why do you believe that you are a good fit with our organization?

3. Describe your onboarding/implementation process and approach if you were selected?

4. Do you conduct quarterly business reviews? If so, what is the nature of those meetings?

5. What do you feel your overall strengths and differentiators are?

6. Do you serve clients with 24x7x365 requirements?

7. What services do you offer besides the core services of a Managed Service Provider?

8. What type of training do you offer either during onboarding or ongoing?

9. What do you feel are your biggest hurdles to a successful relationship?

10. What training resources are available for team members?

11. What type of general expertise can you provide in key technology areas?

12. What differentiates your organization from your competitors in the marketplace?

Processes

1. Do you use in-house or contracted resources for services?

2. Describe your process for migrating the Frey Foundation to your organization?

3. What Foundation resources would you require (i.e., information, data, staff resources, communication) during initial migration and on an ongoing basis?

4. Outline the methods by which clients can access you (i.e. online, by phone, etc.).

5. Describe the escalation and account management process.

6. Where is/are your support center(s) located?

7. How involved is your team with creating project plans/testing during technical projects?

8. Do you follow Information Technology Infrastructure Library (ITIL) or other processes aligned with industry standard practices?

9. Do you participate in or conduct drills or tests i.e. disaster recovery, incident response plan, etc.? If yes, how frequently do you participate or conduct testing?

10. How do you notify users of maintenance windows or system outages?

11. What types of diagrams would you typically create/maintain?

12. Do you offer knowledge bases for common issues and how are they utilized?

13. What is your willingness or ability to support the security systems, phone systems, audio/visual systems?

Technology

1. What types of monitoring agents would you use for end user devices?

2. What is the back-end help desk system you use?

3. Do you offer managed firewalls or other managed technology?

4. Do you offer a security information and event management (SIEM) or other security-based technology?

5. Do you have tools to provide system uptime metrics?

6. What tools do you use for network monitoring?

7. What tools do you use for system monitoring or general health level of end user devices?

8. Do you offer or partner for laptop encryption?

9. If hosting/co-location is an option please describe details of option i.e. services, vendor partners, etc.

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. Please provide details on your standard reporting capabilities.

3. Describe any documentation and support (e.g., user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.

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

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

6. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?

7. The Foundation 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 technical skills.

Pricing & Contracts

1. Please attach cost estimates and worksheets to support these estimates if applicable. Itemize non-recurring and recurring costs. Recurring costs should be quoted as per user per month costs. Other pricing models may be provided as an option.

2. Please attach a Master Services Agreement or other legal documents beyond a proposal which accompany a proposal.

References

1. Please provide at least three references for customers with similar operations to the proposed solution. Include contact names, phone numbers, email addresses and industry.

Additional Information

1. Please provide any other information you feel should be considered in our evaluation.