

Community Action Agency

1214 Greenwood Avenue
Jackson, Michigan 49203

Request for Proposal for IT Services

Community Action Agency of Jackson, Lenawee, and Hillsdale Counties ("CAA") is seeking proposals to provide technical services to its network infrastructure currently in use. The goal of the RFP is to select an entity which will contract with CAA for a one to three year period with extensions possible.

To be considered, all proposals must meet *all* of the requirements outlined below in the section titled "Proposal Requirements." Please send completed proposals to the following address:

Community Action Agency
Attn: Anthony J Samon, Chief Financial Officer
1214 Greenwood Avenue
Jackson, MI 49203

Timeline: Award/Non-Award Notifications & Implementation:

Questions and/or clarification needed pursuant to RFP responses will be made September 5, 2017. Only bids received by 5:00 p.m. on September 13, 2017 will be considered.

Award/Non-Award notifications, pending approval, will be made on September 28, 2017.

Planning and coordination of project outline and scheduling will be held with awarded organization September 22, 2017 with implementation of project plan beginning immediately thereafter.

Community Action Agency Mission:

Community Action Agency is a private, non-profit organization whose programs and services help people help themselves. Our mission is to "promote self-sufficiency" for individuals and families in our three-county area covering Jackson, Lenawee and Hillsdale Counties. Community Action's four main service areas are Education, Housing, Community Development and Health and Nutrition.

1. SUMMARY INFORMATION.

1.1. Summary of Services.

Vendor will provide INFORMATION TECHNOLOGY MANAGEMENT, SERVER MANAGEMENT, NETWORK SERVICES, HELP DESK, AND DESKTOP SUPPORT to CAA (hence forth "CAA") Supported Environments described below which will include:

- Information Technology Management
- Server Management including the building and maintaining of servers either virtual or physical for use in CAA's business
- Network Services including the operation and maintenance of a Cisco and MPLS network.
- Help Desk (L1/L1.5) services including a centralized Help Desk, complementary automated or self-help tools, Service Management services;
- Desktop Support services including procurement services, desktop support, hardware break/fix (warranty and non-warranty), desktop installations, IMAC services, software distribution and service management; and
- Depot services including imaging and configuration services, discovery services, shipping and tracking services.

1.2 SOW Term.

This SOW is effective as of September 22, 2017 (the "SOW Effective Date") and continues in effect for up to three years after the "Go Live" date, which is October 1, 2017, unless extended or terminated earlier in accordance with the Agreement. The Go Live date is one business day after the Transition Completion Date which is September 30, 2017. The Transition of the Services begins on the SOW Effective Date. Vendor must begin performing the Services on the Go Live date.

2. DESCRIPTION OF SERVICES.

The Services required in this SOW are described within this document.

3. Additional SERVICES.

- Vendor is required to have a Project Management Office (PMO) available with PMI certified Project Managers to provide service to CAA as required.
- Vendor is required to have a Service Desk offering that can be used at the discretion of CAA.
- Vendor shall have a fully operational Network Operation Center (NOC) that will have Certified Cisco and Microsoft Engineers that can be called for consultation on a 7 X 24 X 365 basis

4 Proposal Requirements:

All proposals must include the following:

- A description of your company including:
 - the number of employees;
 - years in business;
 - any applicable corporate certifications or memberships such as Microsoft Certified Partner; and,
 - Specific experience with similar work.
- At least two (2) references from clients for whom you have completed similar work.

- A list of project staff including technical bios that describe their experience, education, certifications, and billing rates.
- A discussion of the methodology you use to ensure successful implementation of projects similar to this one.
- A timeline of major milestones for this project.
- Anticipated costs and preferred billing methods.

5 Agency Condition:

It is expressly agreed and understood that the organization awarded a contract for services as defined above shall warrant that no official of CAA has been or will benefit from the direct or indirect award of said contract. The organization awarded a contract for services will agree that a breach of this provision will be considered a breach of an essential term of the Agreement.

DESCRIPTION OF SERVICES

A. Information Technology Management

A.1.1 Overview

Vendor will provide CAA with staff sufficient to provide all services laid out within this document in order to create and implement policies and procedures to protect and maintain IT environment and technology resources of CAA in accordance with its changing needs and priorities.

- Management oversight and installation, maintenance and support of hardware and software on Exhibit A.
- Establish and maintain best practices for IT Support.
- Provide disaster recovery planning and support for IT systems.
- Prioritize workload and projects.
- Provide CAA with technology planning, integrations, expansions, and transitions initiatives.
- Provide IT support to and consultation to CAA faculty and staff as required for enabling organizational initiatives.
- Provide onsite operational management and escalation of support calls received from CAA.
- Create and maintain operational IT-related documentation.
- Provide consultative services to CAA pertaining to third party vendor products and services.
- Perform IT product and services procurement according to CAA established procurement review, approval and order process.
- IT Asset Management, Assist with Software License Management.
- Assist on warranty and subscription support acquisitions and renewals.
- Consult on IT budgets, to include projections for new hardware, subscription support costs, licensing for all server applications
- Maintain CAA's data protection systems (i.e., backup and anti-virus systems and policies)

A.1.2 Additional Server Support Services

- a) Ensure external website is maintained, domain hosting, verify backups
- b) Vendor will provide Information Technology Management 24 x 7 x 365 days a year (366 days a year if a leap year).

B. Server Management

B.1 Overview:

The Server Management will be performed by Vendor and will consist of the following services: (1) Server hardware upgrades; (2) Firmware updates; (3) Patch management; (4) Software installation; (5) Replacement/Refresh; (6) Monitoring; (7) Backup and Disaster Recovery; (8) Warranty review; 1-5 and 7 will normally have to be done outside of normal business hours

B.1.1 Hardware upgrades

Hardware upgrades will include add additional memory, network interface cards, additional drives and possibly to include RAID configurations either BIOS or Software setup

B.1.2 Firmware updates

These should be reviewed Semi-annually and would typically include updates to RAID or manufacturer remote cards. This process typically has to be done manually according to information that is in the Asset Management Database (AMDB).

B.1.3 Patch management

Patch management should be done monthly at minimum and will typically be retrieved from Windows Update or Microsoft Update either manually or via an internal WSUS or SCCM which includes an approval process. Vendor will need to verify that patches will not interfere with other software already installed on servers.

B.1.4 Software installation

Software installation will typically be CAA specific software to accomplish task necessary to the organization. This could be the Server part of a client server application which would need coordination with desktop support service personnel.

B.1.5 Replacement/Refresh

Replacement/Refresh plans are typically based on multiple factors not limited to performance of equipment and cost of warranty extensions or a predetermined age of equipment.

B.1.6 Monitoring

Monitoring will include but not be limited to drive space available, event logs, connectivity, and performance. Some applications that will need to be monitored will be Microsoft Exchange and Active Directory. This will likely be done in an automated way via scheduling PowerShell scripts to email or SCCM software.

B.1.7 Backup, Disaster Recovery, Business Continuity

Backups will need to be done in accordance with recovery time objective (RTO), recovery point objective (RPO) that must be decided by CAA as to how much down time or data loss thresholds

they can withstand. These must be tested routinely. CAA will need to be educated/advised on what current capabilities are and cost of decreasing thresholds. Based on the above information a product or process must be put in place to make sure said thresholds are not exceeded.

B.1.8 Warranty reviews

These will need to be put into a system such as AMDB or something that will notify personnel of upcoming warranty expirations so that they can be planned for in upcoming CAA budgets.

C. Network Management

C.1 Overview:

The Network Management will be performed by Vendor and will consist of the following services: (1) Hardware upgrades; (2) Firmware updates; (3) Patch management; (4) Software/License installation; (5) Replacement/Refresh; (6) Monitoring; (7) Backup; (8) Warranty/Support review;

C.1.1 Hardware upgrades

Hardware upgrades typically only include additional memory in firewall equipment and may be done based on suboptimal performance.

C.1.2 Firmware updates

These should be reviewed Semi-annually and would typically include updates to RAID or manufacturer remote cards. This process is typically has to done manually according to information that is in the AMDB.

C.1.3 Patch management

Patches will need to be retrieved based on flaws or security issues from manufacturers. Current patch levels should be central maintained ideally in the AMDB.

C.1.4 Software/License installation

Software/License installation on firewalls is typically based on need of some functionality you don't currently have such as Virtual Private Network license.

C.1.5 Replacement/Refresh

Typically replacement/refresh is based on predetermined age or if equipment has reached End of Life based on manufactures support.

C.1.6 Monitoring

Use software monitoring to ensure that equipment is living up to manufacturer expectations.

C.1.7 Backup

This will typically entail backing up the current configuration manually or with some other type of software that monitors changes in equipment.

C.1.8 Warranty/Support review

Need to ensure network equipment is covered by warranty or support contract while equipment is in production environment.

D. DESKTOP SUPPORT SERVICES

D.1 Overview

The Desktop Services to be performed by Vendor under this SOW consist of the following services: (1) PC software management service; (2) PC image management services; (3) software distribution service; (4) PC patch management service; (5) PC provisioning service; (6) unscheduled provisioning refresh service; (7) PC staging service; (8) on-site support service; (9) move, add, change service; (10) PC removal; (11) break / fix service; and (12) desktop support service, each as described below.

D.2 PC Software Management Service

D.2.1 Overview

During the term of this SOW, Vendor will provide CAA with PC software management including:

- Management and operation of distribution environment for service locations outlined in EXHIBIT B.
- Data delivery to centralized location for reporting purposes
- Update Asset Management Database (AMDB)

D.2.2 Services Description

Vendor will provide manual updates to the AMDB upon completion of an IMAC, managed refresh deployments or ad-hoc provisioning/refresh services.

D.3 PC Image Management Service

D.3.1 Overview

During the term of this SOW, Vendor will deploy and deliver images that install standard software and CAA specific components onto the supported PC configurations. These components include software defined in core image, technical utilities, management agents (e.g., software distribution agent) and core applications (e.g., MS Office, MS Outlook, and MS Internet Explorer).

D.3.2 Services Description

Images and image modules will be tested by CAA and provided to Vendor for proper installation before release. Modifications to images will be controlled by CAA's change management process.

Images must be supplied via WDS within CAA's infrastructure, which will be available to Vendor to carry out imaging services. CAA will supply a WDS Server to be hosted at the depot site.

D.4 Software Distribution Service

D.4.1 Overview

During the term of this SOW, Vendor must provide Software Distribution services including:

- Push software installation management
- Pull software installation management
- Application re-installation
- Application removal

D.4.2 Services Description

Vendor must facilitate the electronic distribution of software to the supported PC environment in accordance with CAA's existing software license policy.

Vendor must provide the software distribution services utilizing Active Directory, provided by CAA. Vendor will distribute software packages by automated methods, including push software installation/pull software installation through capabilities of CAA's Active Directory infrastructure. Key activities include the following:

- Push Software Installation: software package installs where the software distribution environment initiates the distribution and installation of software packages to networked PC based on the deployment strategy
- Facilities for pull software installations: software package installs where the end-user manually selects and initiates the installation of software packages when allowed by CAA
- Crisis escalation reporting and remediation
- Re-Installation and un-installation of patches if supported by the patch
- Ongoing support personnel

D.5 PC Patch Management Service

D.5.1 Overview

During the term of this SOW, Vendor must provide PC patch management services including:

- Distribution of patches via WSUS & Active Directory infrastructure

D.5.2 Service Description

In providing the PC patch management services, Vendor will carry out the testing, ad hoc installation, and remediation of PC system patches for all supported software (i.e. Microsoft, Adobe, Java, etc.).

Vendor's on-site Service Delivery Manager will work with CAA to assess PC patch compliance on a regular basis. Vendor will use WDS and AMDB to attempt to identify PCs which do not comply with the latest patched version of supported software and, during the normal course of support, patch systems that are out of compliance.

Key activities include the following:

- Testing system patches for all supported software
- Patch distribution and verification for all supported software
- Compliance monitoring and remediation to systems out of compliance

As an example, if a technician is dispatched to a user's PC and discovers that approved recent patch(s) have not been applied, then the technician will apply the patch(s) as necessary and document the event in the ITSM system.

D.6 PC Provisioning Service

D.6.1 Services Description

Vendor will deploy a managed refresh (replacement) of CAA end-user's PCs in the US, based upon CAA's End of Life ("EOL") policy.

D.7 Unscheduled Provisioning Refresh Service

D.7.1 Overview

During the term of this SOW, Vendor must provide unscheduled provisioning refresh services including:

- Replacement of end-user's PCs outside of the defined refresh schedule when such replacement is required for continued end-user access to CAA systems and applications.
- Provisioning of PCs for new end-users

D.7.2 Services Description

Vendor must provide the unscheduled provisioning/refresh service to new end-users or where a replacement is required before the planned end of life of any PC. Replacement of a PC before the planned end of life will be treated as an exceptional case through the change management process.

D.8 PC Staging Service

D.8.1 Overview

During the term of this SOW, Vendor must provide PC staging services including:

- Standard CAA image load by Vendor
- Asset tagging
- Assembly – installation/configuration of requested hardware
- Standard image installation – installation of CAA's standard image onto the PC
- Logical asset creation – update the asset management database with details of the new staged PC

D.8.2 Services Description

The turn-around-times for delivering the PCs to the defined site/country/region will depend on agency priorities at the given time

D.9 On-Site Support Service

D.9.1 Overview

During the term of this SOW, Vendor must provide on-site support services including:

- PC installation as a result of managed refresh, unscheduled provisioning/refresh or out of warranty unit replacement or repair.
- update the asset management database with details of the new staged PC
- update the asset management database with details of the replaced PC

D.9.2 Services Description

In providing the on-site support services Vendor must provide the physical installation of the PC at the end-user's designated CAA location, load the pre-approved software, migrate user

settings and data in an identified location, take the end-user through a brief hardware familiarization process, disburse of any mutually developed “leave-behind” documents (e.g., documentation that CAA would produce or desire to aid end-user in the use of end-user’s new equipment), and removal of packaging material (and old unit if necessary) to a location designated by CAA in or adjacent to the facility. Key activities include the following:

- Installation of new PCs at service locations defined in EXHIBIT B
- Removal of replaced PCs to a central location for pickup by disposal CAA
- update the asset management database with details of the new PC
- update the asset management database with details of the replaced PC

D.10 Move, Add, Change (“MAC”)

D.10.1 Overview

During the term of this SOW, Vendor must provide MAC services including:

- Moves, Adds, Changes (MACs) for equipment at designated locations according to EXHIBIT B
- Facilitate MACs for remote or home based end-users

D.10.2 Services Description

In performing MACs, Vendor will perform services as required to relocate, install new components, and perform changes to CAA PC hardware, software, and attached peripherals.

Typical Move Tasks

“Move” includes the de-installation of the CAA device and included peripheral devices, any necessary preparation of the equipment for transport, physical transport of the equipment to the new location (if within the same building) re-installation and setup, and performance of any PC or included peripheral device configuration changes required to restore end-user functionality at the new location.

Additionally, the move can simply consist of packaging the system and moving the boxed system to a CAA-designated storage area. In this case, no re-installation is performed. This service may be associated with part of an installation service of new equipment to cover the basic de-installation and removal of the old equipment. Typical move tasks include:

- If system is to be reinstalled, verify that system is functioning properly prior to de-installation
- Unplug system and associated peripherals (keyboard, monitor, mouse, printer, power strip, etc.) including network cable (if applicable) to PC
- Safely move equipment to new location to be either stored or re-installed

- Re-install and plug system in new location, including peripherals and network connection
- update the asset management database with details of the PC

Typical Add Tasks

“Add” refers to the physical upgrade of an existing PC. This includes the addition of memory, interface cards, integrating new hard-disk drives, other types of drives or peripherals. Vendor will work with CAA to deliver the service at a mutually scheduled time. Multiple systems will be upgraded at the same time. Typical add tasks include:

- Safely insert or connect new hardware components
- Re-install, re-connect, power-on and startup system
- Upgrade drivers and system setup as necessary
- System verification and testing (SVT)
- Verify that new peripheral, memory and interfaces are operating properly

Typical Change Tasks

“Change and Data Transfer” is defined as a request to modify a functioning CAA device or accessory and is prompted by an end-user logging a Service Request with the Service Desk. This could involve replacing an older version of an application with a newer version, or may refer to modifications to the CAA device, such as the removal of a CD-ROM drive to install a CD-RW drive. Key activities include the following:

- Execution of approved MACs
- Reporting of asset changes as a result of a MAC for use by asset management services defined in this document

D.11 PC Removal

D.11.1 Overview

During the term of this SOW, Vendor must provide PC removal services including:

- PC removal and preparation for disposal

D.11.2 Services Description

In providing the PC removal services Vendor will provide the disconnection and physical removal of supported PCs that are being prepared for disposal or returned to the buffer stock to be re-deployed. PC stock will be maintained by the Vendor.

Vendor will determine PCs that have reached the end-of-life. These PCs will be classified for disposal and collected from CAA sites, packed, disk-wiped using killware or other CAA provided product, and shipped, at CAA's expense, to an asset disposition center.

Where possible, Vendor will reuse the PC. If the PC is obsolete, Vendor will arrange for it to be recycled in compliance with the applicable environmental laws. Vendor and CAA will agree on obsolete items, based on CAA's PC Refresh policy. Key activities include the following:

- Verify asset for disconnection
- Disconnecting monitor, keyboard, mouse, network (at end-user end) and existing peripherals
- Removal of PCs to a CAA designated storage location on the same site
- Deletion of end-user data from removed asset
- If asset has not reached EOL, agree with CAA on redeployment of the asset for another end-user
- If asset has reached EOL, dispose of the asset following CAA's existing disposal policy
- Update the asset management database with details of the PC

D.12 Break / Fix Services

D.12.1 Overview

During the term of this SOW, Vendor must provide break / fix services including:

- Break / fix for PCs at CAA locations in the U.S.
- Ad-hoc PC refurbishment upon CAA's request, once approved through CAA's asset approval process

During the Term of this SOW, CAA must ensure that a majority of the devices (including desktops and laptops) to be supported by Vendor will be covered by a standard manufacturer warranty that covers the cost of both parts and labor for break/fix incidents.

D.12.2 Services Description

In providing the break/fix services Vendor shall validate that PCs provided by CAA will receive on-site repair service including parts & labor based on the Manufacturer's warranty period of the PC. PCs outside their purchased warranty period will be refreshed as part of a managed refresh or unscheduled provisioning/refresh service as a result of failure. Vendor will contact the third party that provides the PC guarantee if Vendor chooses not to service the product directly. Key activities include the following:

- On-site repair or replacement of defective PC
- Spare parts will be used when available and as provided by CAA
- End of life PC will be used as spares when available
- Recommend depot of PC parts & peripherals where feasible
- Remote depot break/fix support for Service Locations without designated Desktop Support staff
- Update the asset management database with details of the replaced PC

Key activities for refurbishment:

- Warranty repairs
- Non-warranty repairs upon approval (all parts charged to CAA), provided that a majority of all supported devices shall be covered by a manufacturer's warranty, purchased at CAA's cost, during the term of the engagement.
- Externally and internally clean the unit
- Perform, validate and certify all decommissioned CAA data drives will have no CAA data remnants by performing disk wiping/sanitation activities in line with a federally-approved (NIST 800-88) secure erasure of data and CAA approval
- Optional department of defense level data wipe of hard drives
- Redeployment extending the use of the PC asset
- PC asset reconfiguration
- Optional imaging (as discussed in other sections)

D.13 Desktop Support Services

D.13.1 Overview

During the term of this SOW, Vendor must provide Desktop services including:

- Desktop Support services in cases where service cannot be performed remotely

D.13.2 Services Description

In providing the Desktop Support services Vendor must provide end-user assistance activities by the presence of a technician at the Service Locations listed in EXHIBIT B to resolve incidents on an end-user's workplace which cannot be resolved remotely at the service desk and do not involve the physical replacement of a hardware component.

Desktop Support services will only be delivered to CAA premises; in case CAA end-user needs on-site assistance, home users and remote sites users will be required to travel to the nearest CAA location with resident engineers or to a depot service exchange. Key activities include the following:

- Dispatch of technician to assist with support that cannot be delivered remotely

D.14 Baseline Values and Volumes on Services

The PC Image Management Services are subject to the following:

- Baseline Images (Laptop, Desktop and Tablet) in Standard
- Supported OS in standard (see Exhibit “A”)

The Move / Add / Change Services are subject to the following:

- IMACs to be performed in all CAA locations.

D.15 Other Activities and Responsibilities

- CAA will make reasonable efforts to encourage its staff to work cooperatively with Vendor to transfer knowledge and deliver the Desktop Services.
- Vendor will use best practice standards, procedures, processes, and management to deliver the Desktop Services.
- Vendor will provide the Desktop Services during CAA office hours Monday through Friday, excluding local CAA holidays for supported locations as defined in EXHIBIT B.
- Vendor may be required to provide afterhours Desktop Services on a time and materials basis.

D.16 Roles and Responsibilities

The following matrix details the breakout of the roles and responsibilities as they apply to Desktop Support Services:

Creation and Maintenance of IT Policies and Procedures

Maintenance of Nortel MICR phone systems

Purchase, Management & support of cell phones

Orchestrate work done by third party vendors on CAA data and telecom services and cabling

Orchestrate work done by third party vendors on CAA printing services

D.16.1 PC Software Management

The respective roles and responsibilities of Vendor and CAA personnel with respect to the PC software management services for the supported environment are set forth below in the following matrix:

EXHIBIT "A" HARDWARE AND SOFTWARE

Vendor will provide the services described in the Agreement, including technology refreshment and upgrades. Advancements in technology do not make it in the best interest of the CAA to specify hardware or software for technology refreshment. It is understood that the following list represents CAA's current hardware and software complement.

BASIC HARDWARE LISTING (at time of this RFP):

- 235 Desktops, Laptops and Tablets
- 40 Network Laser Printers/Copiers (Sharp/Lexmark/Dell/HP)
- 27 Servers (Virtual and Physical)
- 7 Network Switches (Cisco)
- 20 Cisco ASA 55XX Firewalls
- 6 Cisco Wireless Access Points

BASIC SOFTWARE LISTING (at time of this RFP):

Current workstation Operating System standard is Windows 10 Enterprise. Server Operating System standard is currently Windows Server 2012r2. Also, the CAA may from time to time add new software and require software upgrades that Supplier will support.

Microsoft Office Professional Pro 2016 Suite, Microsoft Exchange 2016, Microsoft Outlook on the Web Access, Microsoft DPM 2012r2, Microsoft SCCM 2012r2, Adobe Reader, Cisco Anyconnect Client, Sage Abra Suite, ABRA Payroll to MIP General Ledger, Abila Fund Account 100 (MIP), ChildPlus.net, DBAFACSPRO, Oracle Java, OrgPlus, TaxSlayer.

EXHIBIT "B" Basic Current Site Listing

Community Action Agency Locations

Jackson County
Lenawee County
Hillsdale County

Resource Center Locations

Ayieko Resource Center
Barham Neighborhood Resource Center

Head Start Locations

Ashton Ridge
Bailey School
Bennett
Camden
Chalet
Francis St. Primary
Frost
Greenfield
Hillsdale
Hunt
Lincoln
McCulloch
North Adams
Northeast
Pittsford
Reading
Salvation Army
Shahan
Springport
Tarrant
Waldron