



Request for Proposal

Specifications, Terms & Conditions
for

1. Information Technology Systems Support Services
2. Multi-Function Devices & Single Function Printer Management Services

Issue Date: May 3, 2019

Introduction and Purpose

Milestones AAA (MILESTONES) is soliciting proposals from qualified professional service providers for Information Technology support services. The qualified service provider will assume management of MILESTONES' IT infrastructure and provide IT management and related services to all sites owned by MILESTONES for a period of 5 years. MILESTONES seeks to significantly improve and update its information technology infrastructure and enhance the quality of services it offers to clients/employees while retaining ownership of its computer hardware and software licensing. It will be the responsibility of the service provider to recommend hardware and software solutions through review of MILESTONES' current infrastructure, some of which will be needed immediately upon start of the contract. The service provider will assist MILESTONES in securing available discounts offered to non-profit organizations by hardware and software vendors. MILESTONES also requires assistance to ensure industry-specific software will run on newly procured hardware. The intention of MILESTONES is to reduce annual IT expenses, including monthly fees, to manageable and predictable levels for budgeting purposes. The second component of this RFP is a request to provide, as a separate and self-contained proposal, a bid for multi-function devices and single function printers and maintenance services.

Respondent Corporate Information

For the purposes of understanding more about your company and your ability to successfully fulfill Milestones's needs, please provide the information below as part of your response, clearly referencing each specific question.

1. Provide a brief overview of your organization's involvement in providing IT value added services in the marketplace.
2. Provide number of years organization has been in this business.
3. Describe education or experience levels of employees that will be dedicated to the Milestones account.
4. Describe organization's approach to account management.

5. Describe work order/user support request system.
6. Describe any user support response time guarantees.
7. Describe experience working with non-profit organizations.
8. Describe any software or hardware vendors of which your organization is designated as an official distributor.
9. Will any component of your proposal be subcontracted to any third party vendor(s)? If so, describe the components to be subcontracted and provide details of any agreement in place with the subcontracted firm/individual(s) as well as a summary of past work that you have successfully completed together.
10. Please identify three current customer accounts that are similar in scope and requirements to those of Milestones.
11. Please identify and describe any services that would NOT be included in your managed IT service agreement.
12. If you are not Milestones's current provider, and should your organization be awarded this contract, please provide a proposed work plan for a migration to your organization, specifically:
 - a. Key activities
 - b. Project Timeline (current contract expires December 14, 2019)
 - c. Information/resource requirements
 - d. Key milestones/checkpoints/decision points

Background Summary

MILESTONES Area Agency on Aging is one of six State of Iowa designated AAA resources tasked with connecting older adults, people with disabilities and their caregivers to services in the following seventeen Iowa counties: Appanoose, Clinton, Davis, Des Moines, Henry, Jefferson, Keokuk, Lee, Louisa, Lucas, Mahaska, Monroe, Muscatine, Scott, Van Buren, Wapello, and Wayne Counties in Iowa.

Milestones is currently using a simple flat Active Directory domain for its office operations which consists of a corporate office, two satellite office locations, and 30-35 remote users at site locations in the field. These remote locations are connected to the main site by IPSEC VPN over fiber or cable internet connections. Current IT services and hardware are managed by a 3rd party with no onsite staff housed at the agency. It is anticipated that some server and network hardware will be returned at the end of its lease period; end date of current contract is December 14, 2019. Replacements for all affected hardware and services will be required to be in place and operating by no later than November 4th.

Environment Detail

- 3 locations: one corporate office in Davenport and two additional office locations in Ottumwa and Burlington.
- Sites linked by IPSEC VPN. Main site bandwidth is 100 Mbps fiber. All remote sites are commercial cable internet at 15/3 Mbps.
- Approximately 60 users total, with approximately 15 at single main location; Ottumwa and Burlington satellite offices have ~10 users at each location. User equipment consists of a combination of desktop and laptop units.
- Approximately 30 remote users in the field access the network via VPN from individual PCs.
- Active Directory domain (2008R2)

- Email and Office software through Office 365
- Phone system provided and managed by ICN and is not part of this RFP

Hardware Detail

- 4 HP Servers: 2 at main site (Davenport), 1 each at 2 remote sites (Burlington and Ottumwa)
- Approximately 60 HP workstations of varying age
- HP ProCurve 2910 series switches

Software Detail

- 5 Windows servers (virtual, 2008 and 2008 R2)
- VMWare ESXi
- Office 365
- Adobe Products including Photoshop and Illustrator
- Several custom or niche software applications:
 - KRONOS
 - GMS
 - Harmony/Well-Sky
 - PC-ACE Pro32
 - Quickbooks

Printer/MFD Detail

Milestones would prefer Contractor be able to support both Managed Services and Managed Printing. Contractor must include cost of return of equipment at the end of lease period, where applicable. Equipment is currently housed at the following locations:

Bloomfield Meal Site - Bloomfield Senior Center • 109 E. Franklin St. • Bloomfield, IA 52537

Burlington Office - SE Iowa Area Agency on Aging • 509 Jefferson St. Burlington, IA 52601

Centerville Meal Site - Centerville Senior Center • 922 W. State St. • Centerville, IA 52544

Chariton Meal Site - Chariton Senior Center • 117 S. Grand St. • Chariton, IA 50049

Columbus Junction Meal Site - Columbus Junction Community Senior Center • 125 E Walnut St. • Columbus Junction, IA 52738

Corydon Meal Site - Corydon Senior Center • 511 E. Marion St. • P.O. Box 187 • Corydon, IA 50060

Davenport Office - 935 E. 53rd Street Davenport, IA 52807

Keosauqua Meal Site - Keosauqua Senior Center • 801 Front St. • P.O. Box 535 • Keosauqua, IA 52565

Muscatine Office - Clark House • 117 West 3rd Street • Muscatine, IA 52761

Ottumwa Office - 623 Pennsylvania Ave. Ottumwa, IA 52501

Sigourney Meal Site - Sigourney Senior Center • 214 S. Main St. • Sigourney, IA 52591

Equipment Type* for Lease and Location:

Burlington Office - (1) device

(1) 35ppm **COLOR** MFP with Fax, Stapling finisher, and 4 paper drawers

Davenport Office – (12) devices

(1) 35ppm **COLOR** MFP with Fax, Stapling finisher, and 4 paper drawers

(1) 35ppm **MONOCHROME** MFP with Fax, Stapling finisher, and 4 paper drawers

(8) 40 ppm **MONOCHROME** single function printer with 1 drawer

(1) 47 ppm **MONOCHROME** desktop MFP with fax (high BW volume)

Ottumwa Office – (5) devices

(1) 35ppm **COLOR** MFP with Fax, Stapling finisher, and 4 paper drawers

(4) 40 ppm **MONOCHROME** single function printer with 1 drawer

**Faster models than identified above are fine to submit for RFP.*

All machines will require duplex printing.

We have several owned printers at the various locations, including at meal sites, which will need to be included in the maintenance contract. Meal site locations include– but are not necessarily limited to– those identified on the previous page. Equipment includes a combination of Samsung, HP, and Sharp models.

Pricing should be given on a “per copy” basis for B/W and for color.

Current Buyout Information

Quote should include buyout to return the following current agency leases:

- Eleven (11) machines leased through GreatAmerica Financial Services, lease ending 11/24/2019; payment is \$2939.85/month;
- Four (4) machines leased through Wells Fargo, lease ending 1/30/22; payment is \$392.96/month.

Contracted company would take responsibility for physical removal and return of the currently leased machines, plus payment of cancelling the contracts. It is expected awardee will assess current printer/copier inventory and provide assistance in “right-sizing” agency inventory appropriate to need.

Instruction to Bidders

Three (3) paper copies of proposal must be delivered to Davenport office by 4:30 PM on June 3rd.

Bidders must also submit an electronic copy of proposal in PDF format to bpasman@milestonesaaa.org
PDF must match printed verbiage precisely.

Late proposals will not be accepted, no exceptions.

All costs required for the preparation and submission of a proposal shall be borne by Bidder. The RFP creates no obligation on the part of MILESTONES to award a contract or to compensate the Bidder for any costs incurred during proposal presentation, response, submission, or any other activity involved in RFP preparation or submittal.

Only one proposal response will be accepted from any one person, partnership, corporation, or other entity; however, several alternatives (i.e. various solution options) may be included in one response.

MILESTONES reserves the right to reject any and all proposals for failure to meet the requirements contained herein, to waive any technicalities, and to select the proposal which, in MILESTONES's sole judgment, best meets the needs and requirements of the agency.

MILESTONES reserves the right to award a contract based upon proposals received without further discussion or negotiation. Bidders should not rely upon the opportunity to alter their qualifications during discussions.

MILESTONES further reserves the right to make such investigation as it deems necessary to determine the ability of Bidders to furnish the required services, and Bidders shall furnish all such information for this purpose as MILESTONES may request.

Bidders must specifically identify any portions of their submittals deemed to contain confidential or proprietary information, or trade secrets. Those portions must be readily separable from the balance of the proposal.

Schedule

RFP Issued	May 3, 2019
Written Intent to Respond and Clarification Questions Due	May 17
Clarification Responses Provided to all Bidders (no later than)	May 24
Proposals Due	June 3, 2019 no later than 4:00 PM
Provider interviews	June 12, 13, 14
Contract Award	July 1, 2019

Scope of Work

The following details the services that the prospective contractor should consider providing to MILESTONES in the area of information services.

Initial Assessment

- Compile/update inventory of all information technology related assets
- Assess system architecture and current processes
- Make recommendations for improved company-wide IT system performance

Desktop Applications Support

- Perform basic support functions including installing thin clients, laptops, printers, peripherals, and office automation software.
- Diagnosing and correcting application problems.
- Configuring desktops and laptops for standard applications, including setting up new units or reconfiguring owned units for new users.

- Move, Add, Change – Changes to the location or configuration of existing equipment or software, and installation of additional equipment or software.
- Performing advanced troubleshooting.
- Technical Support – Support all Milestones’s user inquiries via help desk (or equivalent), including support for remote users, and as needed on site support.
- Assist designated MILESTONES personnel with software and hardware purchases. Assist in development of software/hardware policies and procedures.

Server Administration Services

- Manage servers and networks to provide a secure, reliable, and efficient environment for users.
- Ensure scheduled preventive maintenance for equipment is properly and promptly performed.
- Maintain the maintenance records on the equipment.
- Setup new users and edit or remove existing users on server.
- Monitor server performance and remaining capacity.
- Configuration management, including changes, upgrades, patches, etc.
- Support of client-specific software as it relates to the server(s) and associated hardware.
- Coordinate warranty and maintenance work with outside vendors.

Network Administration Services

- Scope of activity includes all MILESTONES network equipment including switches, firewalls, routers, wireless access points and other security devices.
- Alert notifications to designated MILESTONES personnel in the event of network intrusion or other security issues.
- Proactive monitoring of network equipment including bandwidth utilization.
- General network troubleshooting and maintenance.
- Maintain up-to-date network documentation.

Backup and disaster recovery services

- Scope of activity includes both onsite and offsite backup storage services for approximately 5TB of data on 4 servers.
- Frequency of back-up should include multiple incremental backups daily.
- Server back-up images should be bootable in a virtual environment either on or off site in the event of a site disaster, with a recovery point objective of no later than the end of the previous business day.
- Offsite backup images should be tested for consistency at regular intervals.
- The recovery time objective (time from failure to recovery) should be included with proposal.
- If disaster recovery is not included in the service contract, explain pricing for recovery in proposal.

Security

- Maintenance of endpoint security software on MILESTONES servers, workstations, and network devices (where applicable).
- Perform security audits as requested and notify MILESTONES personnel, immediately, of suspected breaches of security or intrusion detection.

- Provide Windows security patch management and ensure all security patches are applied in a timely manner.
- Support updates and patching for some 3rd party software, such as Adobe products.
- Specify whether your network security services can provide email encryption or spam filtering.
- Configure secure remote access for specific users.
- Provide comprehensive network security at the network gateway, including IDS/IPS, inspection of SSL traffic, botnet/ransomware traffic detection.
- Assist in secure disposal of computer waste and provide certificate of data destruction for retired and decommissioned hardware.

Strategic Planning

- Work with Milestones management to develop a long-term strategic technology plan that right-sizes the agency's current inventory, makes the best use of new and existing technologies, and produces a pragmatic and effective technology replacement/enhancement schedule to best enable the organization to fulfill its overall mandate in the community.
- Assist in planning and design of major system changes, including installation and upgrade of new or existing systems; manage life-cycle of hardware units, including end-of-life notifications, replacement, and asset decommissioning/disposal.
- Make recommendations for future purchasing and technology needs.
- Install new servers, software and hardware and transfer data when required. If this is not included in a managed services contract, hourly or other rates should be provided.
- Assist in development of customized agency policies and best practices related to the use of technology
- Act as a technical liaison between our employees and service providers, such as Mediacom, and our vendors, such as software providers.

Printer and print services

- Manage, maintain, troubleshoot and repair all onsite copiers, scanners, printers, and multifunction devices at all agency locations/users.
- Make recommendations for future printing device purchases.
- Maintenance contracts on printers to be presented on a per-page billed basis. It is the goal of MILESTONES to consolidate print and IT services under a single contract.

Alternatives

Bidders may propose alternative services, hardware configurations, or network architectures, if vendor can demonstrate alternatives will meet requirements in the Introduction and Purpose section above.

Selection Criteria

Milestones will use multiple criteria to select the most appropriate partner. The following list summarizes the major qualitative areas that will be evaluated, along with their overall weighting (x __).

- Previous relevant experience x 1
- Vendor strength and stability x 2
- Reporting capabilities x 3
- Industry expertise and experience x 4

- Financial considerations x 5
- Account management x 6
- Demonstrated customer service quality and support x 7

Contact, Notification of Intent to Respond and Clarification Questions

Becky Passman is the designated Milestones representative for this initiative. Please indicate your intention to respond, along with any clarification questions, by email to bpassman@milestonesaaa.org by the *Intent to Respond and Questions Due* date indicated in the *Schedule* on page 5. Questions should be submitted in writing (email preferred). In addition, please provide the contact details of the individual responsible for coordinating your RFP response. Submitted questions, along with answers, will be provided to the entire group of respondents by the *Clarification Responses Provided* date.

Hard copies of proposals may be delivered to:

Milestones Area Agency on Aging
Attn: Becky Passman
935 E. 53rd Street
Davenport, IA 52807

No Obligation

The submission of a proposal shall not in any manner oblige Milestones to enter into a contract or to be responsible for the costs incurred by any organization which responds to this request.

Agreement of Non-Disclosure

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