



April 8, 2019

To: Prospective Bidders
From: Habitat for Humanity of Jacksonville, Inc. (HabiJax)
RE: Request for Proposal (RFP) for Information Technology Management and Support

Habitat for Humanity of Jacksonville, Inc. (HabiJax) has issued an RFP for Information Technology Management and Support beginning July 1, 2019. Below is a schedule of the RFP timeline:

April 8, 2019	Advertisement of RFP
April 8, 2019 – April 12, 2019	Receive questions from potential respondents
April 15, 2019	Purchaser responses to questions
May 3, 2019	Deadline for Proposal Submission
May 20, 2019	Anticipated Award Date

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Request for Proposal

Purpose

The purpose of this Request for Proposal (RFP) is to contract for managed information technology services for Habitat for Humanity of Jacksonville, Inc. The organization is looking for bids for both full service managed information technology services or some level of partial managed information technology services depending on pricing and recommendations of our needs.

Description of Entity

Habitat for Humanity of Jacksonville, Inc. (HabiJax) is a local affiliate of Habitat for Humanity. HabiJax is one of the largest non-profit affordable homeownership providers in Duval County. HabiJax is considered to be one of the most successful Habitat for Humanity affiliates in the United States, having provided homeownership opportunities to over 2,300 families. In addition, HabiJax is an advocate for affordable housing and fair housing policies and provides workshops and other trainings to help prepare families for the responsibilities of homeownership.

HabiJax employs just under 50 employees at three locations in Jacksonville, Florida.

Scope of Services

The Scope of Services may include, but may not be limited to, the following:

1. Administration of day-to-day IT services such as new user setup, email management, data management, network management and security
2. Monitoring of all IT systems
3. Remote and local onsite help to solve IT problems
4. Maintain all system and software updates
5. Maintain and supply daily and offsite backups of network which is secure and encrypted at rest and during transport. Must have the capability to reconstruct entire system in less than 24 hours. Maintain backup hardware, software and maintenance for the duration of the agreement. Offsite backup must be in a SSAE16 Type II Audited environment.
6. Keep network secure by providing software and licenses for spam, web and virus filters
7. Provide specifications for the purchase of hardware and software
8. Installation of hardware, software, cell phone, tablet, and other mobile devices
9. Track and maintain hardware and software warranties and expirations for all servers, pc, and other IT devices
10. Manage all IT vendors
11. Monthly reporting of service performance
12. 24/7 Hardware/Network Support at all three locations

Technical Scope

1. Citrix XenDesktop virtual desktop environment
2. WYSE thin clients
3. Windows based desktop and laptop PCs
4. XenServer virtual servers
5. Non-profit licensing

Certification Requirements

The purpose of this section is to list the certification requirements needed to service our network efficiently.

1. Microsoft Gold Certification
2. SonicWALL Certification
3. SSAE 16 Type II SOC 1 audited organization. This should include the Firm itself as well as any third party data center providers.
4. VMWare Certification
5. Citrix Certification
6. Cyber Liability Insurance, including data loss and errors and omissions of at least \$5,000,000

Contents of Request for Proposal

The content and sequence of the Request for Proposal will be as follows:

Section A

Firm shall provide a brief profile of their company, which should include the Firm's legal name, history, business structure, type of business, years in business, location of parent company and branches, proposed service team, total number of personnel, certifications. Include copies of certifications or evidence thereof.

Section B

A narrative which provides background on the Firm's basic familiarity or experience in providing similar services to regional governmental or similar entities and the number of years of related experience.

Section C

Firm shall provide competent and qualified personnel to effectively carry out its responsibilities under this agreement. Describe the qualifications of the individual(s) providing services under this agreement.

Section D

Provide examples of similar services the Firm provides to other clients and provide at least five (5) references of similar services. The reference list should include name of the entity, location of entity, a contact person, telephone number, email address, and a brief description of services provided.

Section E

Describe the services the Firm would provide under this agreement.

Section F

Describe how the Firm provides its services. To include but not limited to:

1. How does the Firm provide customer service and support?
2. Is customer service and support local or outsourced?
3. Does the Firm provide monitoring services and support? If so, are the services and support local or outsourced?
4. What is the Firm's security policy for sensitive information such as passwords, network access, etc.?

5. Describe external audits completed on the firm to enhance security and the frequency of those audits (SSAE 16, etc.).
6. What are the Firm's office hours?
7. Does the Firm provide afterhours support?
8. Does the Firm have a call center?
9. Does the Firm use cloud services? If so, explain the services offered and the location of the cloud services.
10. What is the Firm's response time policy?
11. How many technicians are on staff and how many will be provided to support this agreement?
12. Describe the firm's approach to IT strategy for clients
13. Who is responsible for IT strategy?
14. Please address the following support items:
 - Server support
 - Network support
 - Application support & license management
 - Desktop & laptop support
 - Help desk support – local and remote
 - Is it limited to a quota of calls per day, week or month?
 - What are the help desk hours? If they do not cover all our hours of operations, please describe what coverage will be provided for off hours
 - Is the help desk available to all employees?
 - What are the limitations of the help desk?
 - Is help desk staff local? If not, where are they located?
 - What is your average response time?
 - What is your average problem resolution time?
 - Are help desk staff employees of the support company or subcontracted?
 - Are help desk staff full-time?
 - How many people are available to provide help desk support?
 - What is the skill/certification level of first-level help desk staff?
 - What happens if the help desk cannot resolve the problem? Describe help desk ticket escalation process.
 - Other User Support (not included above)
 - Internet Service Providers
 - Electronic Mail
 - Security of Equipment and Data
 - Security Plan for Remote Processing
 - Security testing and documentation (e.g., intrusion testing)
 - Support for IT Operational Recovery Plan
 - Assistance with development of IT policies and procedures
- Is training provided?
- What kind of insurance coverage does the company have?
 - If awarded the business, are you willing to provide a copy of your insurance declaration?
- How do you ensure compliance with information security standards? Also describe what other security standards and/or compliance environments you have experience working in
- Explain your process for handling special requests or projects
- Describe what IT systems you have experience working with (including software applications, servers, etc.)

- Describe your company's new customer onboarding plan
- What is included in onboarding? What is excluded, but available at additional cost?
- What are your key differentiators that will add value for our organization?
-

Address specifically the following (and feel free to include anything not included in this list):

- What are the monthly costs and what included in the monthly costs?
- What is excluded from the monthly costs? Please provide detail and cost breakdown
- If your firm provides full service (flat monthly fee and no off agreement costs), please provide that information as well with pricing
- On-site time
- Help desk support – normal work hours
- After hours support
- Travel time and expense
- Training
- Quarterly business reviews
- Response to major system problems or outages
- Fees for service initiation
- Fees for connectivity to support site
- Ad-hoc services
- Escalation fees
- Offsite disaster recovery
- Response and emergency fees

Section G

Business

1. Provide an overview of your company, including date of incorporation, locations, number of employees, area(s) of specialty, any additional information that may support the proposal.
 - a. What are your operating hours?
 - b. What services are provided on weekends and holidays?
2. Describe your organizational structure and explain how your organization qualifies to be responsive to the requirements of this RFP, together with an explanation of your business model.
3. Describe your company's security certification and expertise.
4. Do you regularly maintain a bench of available resources?
 - a. If so, how much capacity is routinely available?
 - b. If not, how do you respond to rapid increases in demand?
5. Describe how you screen and select employees.
 - a. What thresholds of skill must they establish?
 - b. What kinds of checks and verifications do you perform?
 - c. Describe your training program.
 - d. Describe all support staff that would be expected to serve our organization, including executive, project and account staff.
 - e. Describe the responsibilities of each individual proposed to be assigned to our organization.
 - f. Describe how after hours support is made available.

- g. What was your turnover rate over the last 12 months?
- h. Describe your access to a qualified labor pool.

Technical Service Levels

Describe service levels you will provide to our organization. Note that penalties will be assessed for not meeting service level response times identified.

1. Describe your work order/trouble ticket system.
2. Describe availability of key staff during normal business hours.
3. Is staff available 24/7, or if not, what off hours support is available? Is there an additional cost for off-hours support? If so, what is the cost model?
4. Provide your guaranteed response time for issues dependent upon severity and time of day.
5. Provide your average response time for after-hours issues.
6. Scheduled down times for routine maintenance - how are scheduled down times determined; how are they communicated?
7. How do you propose that the service level agreement be enforced?
8. Describe your communication strategy for keeping our organization informed of system conditions and changes.
9. Describe how you would assist our organization's management in its strategic planning to ensure that the IT system retains its usefulness, viability, compatibility, and dependability.
10. Describe your plans for disaster recovery. Will you assist our organization in developing a disaster recovery plan? Is this included, or at an additional cost?
11. Describe how your on-site support representative would work and describe any special requirements that would need to be filled by the organization.
12. Describe how major software upgrades would be applied and what upgrades would require additional fees.
13. Describe your process for maintaining and managing inventory, including warranty expiration dates, software license agreements, hardware aging and recommended upgrades?

Monitoring

1. Describe your monitoring tools and strategies to monitor and insure the stability of the computing environment at our organization.
2. Describe how these monitoring results would be communicated to our organization.

Documentation and Records

3. Describe how you would document and record maintenance, installation, performance, and changes to the system.
4. Describe the documentation that you would make available to our organization at the end of the contract period.
5. Describe how you would maintain confidentiality in strict conformance with other confidentiality laws and regulations.
6. What type of reporting will you provide our organization and what is the frequency of the reporting?

Technical Specifications

Resources provided by our organization

Our organization management will retain certain key roles and responsibilities designed to drive overall services, alignment with business strategy and objectives, including service quality and assurance considerations as well as setting the overall direction of the IT Managed Services in collaboration with the vendor.

Resources provided by vendor

The vendor will be expected to provide the following:

- High level technical work plan
- Infrastructure plan (including environment management)
- Security & testing plan (periodic intrusion testing)
- Inventory management (hardware & software) plan
- Configuration management plan including system transition strategy procedures
- Change control plan
- Deployment plan
- Transition plan to Managed Services support
- Quality Assurance planning

Engagement Governance

Within thirty (30) days after the Effective Date, Our organization management and selected vendor will determine an appropriate set of scheduled periodic meetings or telephone conference calls. The meeting will include the following:

- Discuss performance
- Planned or anticipated activities that may adversely affect performance

System Changes

The vendor will comply with the following control procedures for any changes to environments or supporting production infrastructure:

- Vendor will schedule implementation of system changes so as not to unreasonably interrupt business operations
- Vendor will not make system changes that would materially alter the functionality of the systems used to provide the services or materially degrade the performance of the services, without first obtaining approval
 - Vendor may make temporary system changes at any time and without Our organization's approval, to the extent such system changes are necessary, in the vendors judgment, (i) to maintain the continuity of the services, (ii) to correct an event or occurrence that would substantially prevent, hinder or delay the operation of Our organization's critical business functions; and (iii) to prevent damage to the network. The vendor will promptly notify Our organization management of all such temporary system changes and at the conclusion of the emergency; the vendor will restore any system changes to the pre-emergency state, as warranted

- Prior to implementing any software or equipment, Vendor will use customary testing efforts to verify that the item has been properly installed is operating in conformance with specifications and is performing as intended
- Vendor will follow a mutually agreed, formalized and published methodology in migrating systems, environments, configurations and vendor supplied programs from development and testing environments into production environments

Section H

Firm shall certify and provide a statement that they are financially stable and have the necessary resources to provide the services at the level required.

Section I

Public Entity Crime and Discriminatory Vendor List: In accordance with Florida Statutes section 287.133 and section 287.134, the Firm will complete and return as part of the RFP the Public Entity Crimes Certification form.

Section J

Drug-Free Work Place Form: In accordance with Florida Statutes section 287.087, the Firm will complete and return as part of the RFP the Drug-Free Workplace Certification form.

Instructions on Proposal Submission

Closing Submission Date

Proposals must be submitted no later than 3:00 p.m. on May 3, 2019. They may be submitted in person or by mail delivery, but they must be received by 3:00 p.m. on May 3, 2019.

Inquiries

Inquiries concerning this RFP should be directed to aleatherbury@habijax.org.

Conditions of Proposal

All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Firm.

Instructions to Prospective Bidders

Your proposal should be addressed as follows:

Habitat for Humanity of Jacksonville, Inc. (HabiJax)

Attn: Angie Leatherbury

2404 Hubbard Street

Jacksonville, FL 32206

It is important that the Firm's proposal be submitted in a sealed envelope clearly marked in the lower left-hand corner with the following information:

SEALED PROPOSAL FOR IT SERVICES

Failure to do so may result in premature disclosure of your proposal.

It is the responsibility of the Firm to insure that the proposal is received by HabiJax by the date and time specified above.

Late proposals will not be considered.

Right to Reject

HabiJax reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based upon the factors described in this RFP. HabiJax may request additional information from any proposer.

Notification of Award

It is expected that a decision selecting the successful Firm will be made within one month of the closing date for the receipt of proposals.

Confidentiality

The Firm agrees to keep the information related to this agreement in strict confidence. Other than the reports submitted to the HabiJax, the Firm agrees not to publish, reproduce or otherwise divulge such information, in whole or in part, in any manner or form or authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to the information while in the Firm's possession to those employees on the Firm's staff who must have the information on a "need-to-know" basis. The Firm agrees to immediately notify, in writing, HabiJax's authorized representative in the event the Firm determines or has reason to suspect a breach of this requirement.

Insurance Requirement

The Firm awarded the contract shall secure, maintain and present insurance coverage reflecting the minimum amounts of \$ 1,000,000 for general liability, \$1,000,000 for professional liability and workers compensation to include employers liability limits as required by the State of Florida, and \$5,000,000 for data loss and errors and omissions.

The Firm must also name HabiJax as an additional insured on the general liability and professional liability.

Proposal Evaluation

Submission of Proposals

All proposals shall include four copies of all information detailed in Item E. above. These documents will become part of the agreement.

Nonresponsive Proposals

HabiJax reserves the right to waive any immaterial inconsistencies in a proposal which might otherwise appear to make said proposal nonresponsive. Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal is not received timely in accordance with the terms of this RFP.
2. The proposal does not include the Certifications, Drug-Free Workplace form and Public Entity Crimes form.
3. The proposal is not adequate to form a judgment by the reviewers that the services requested would be provided by the Firm.

Evaluation

Evaluation of each proposal will be based on the following criteria:

Factors Point Range

1. Organization, size, and structure of Firm 0-15
2. Strategy planning capacity and structure 0-10
3. Security protocols and processes 0-10
4. Prior experience providing related services to similar organizations 0-10
5. Qualifications of staff to be assigned to provide services 0-10
6. Certification requirements meet 0-15
7. Firm's understanding of work to be performed. 0-10
8. Price 0-20

MAXIMUM POINTS: 100

HabiJax, at its discretion, request presentations by or meeting with any or all Firms, to clarify or negotiate modifications of the Firm's proposals.

However, HabiJax reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, which the Firm can propose.

HabiJax contemplates award of the contract to the responsible Firm with the highest total points.