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# Educational Alliance Request for Proposal

Part 1: IT Services

Part 2: vCISO Services

# Introduction and Overview

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## 2.1 General

The Educational Alliance, Inc. (referred to hereafter as “Educational Alliance”) is an organization which has served Lower Manhattan since 1889. Originally a settlement house for East European Jews immigrating to New York City, the history of the Lower East Side and the history of Educational Alliance are deeply intertwined.

In addition to basic classes and programs on how to be a good American, our flagship building at 197 East Broadway offered a creative outlet via the Educational Alliance Art School, recreational respite in the Rooftop Garden (serving 10,000 people per day in the summer of 1903), cultural programming in the theater (Eddie Cantor made his stage debut there in 1905), and other escapes from cramped tenement life.

In the 1940s, as the population of the Lower East Side changed, so did Educational Alliance. We shifted from being volunteer run and introduced social service programs overseen by trained professionals. We were one of the first organizations to offer Head Start for early childhood education, and we recently addressed the needs of the aging population of the neighborhood by helping establish one of the first Naturally Occurring Retirement Communities.

Our history is one of embracing all of the new arrivals to the Lower East Side, while still maintaining special ties to our Jewish heritage. In addition to our original building, which now houses the Manny Cantor Center, Educational Alliance operates three other freestanding community centers—the 14th Street Y, Center for Recovery and Wellness, and Sirovich Center for Balanced Living—as well as a network of community schools.

**The intent of this RFP** is to seek proposals for an IT provider to deliver services to its Educational Alliance’s Lower East Side Headquarters and 14 other branches located in lower Manhattan.

The services requested in this RFP consist of IT services to be provided but are not limited to:

- Infrastructure Support, Maintenance & Monitoring
  - Network Hardware (Firewall, Switch, Wireless Access Points)
  - Server Hardware
  - Storage Hardware and corresponding Backup
  - Phone System Hardware
  - POTS lines for Elevator and Fire Alarm Services
  - Video Camera (supplementary support to contracted vendors)
- Desktop/Device Support
  - Windows
  - Mac Devices
  - iOS and Android Tablets w/corresponding MDM software
  - Asset Management
  - DNS Security and Anti-Virus Management

- Cloud Support
  - Microsoft Office365 Email/OneDrive/SharePoint
  - Microsoft Azure Virtual Infrastructure
  - Various Web-Based Software
  - WebSite Domain Management (not development)
- Event and Audio Visual Meeting Setups (including tear-downs)
  - Smartboards and/or TVs displaying various community information
- Third party Vendor Management
  - Internet Service Providers
  - Security Systems including cameras and/or badging (ExacVision & Bivio)
  - Membership systems such as Easy Camp or Links Modular Solutions or others
  - Custom software (Quattro, MIPS, etc)
- (2) Full-Time On-Site Employees Staffed in HQ location
- C.I.O. Consultation Services
  - Required Bi-Monthly Meetings w/IT Manager
  - Budget Planning
  - Vendor Management
  - New Initiative and Product Discussions

All of the above will hereafter collectively be referred to as the "Solution." "Proposal" shall mean the Vendor's bid to provide the services in response to this RFP. "Vendor" shall mean a recipient of this RFP who submits a proposal to Educational Alliance and includes any subcontractors to be used by the Vendor to provide the solution. "Agreement" shall mean the agreement that Educational Alliance executes with awarded vendor.

Educational Alliance issues this request for an Outsourced IT Provider with the intent of having a third party manage IT for Educational Alliance. The approach to the response to this RFP Solution must be agreed to and approved by the parties prior to the start of the engagement.

## 2.2 Confidentiality of Information

This RFP, and all information provided to the Vendor in connection herewith, is Educational Alliance's confidential and proprietary information (the "Information"). The Vendor may not disclose this RFP, or any Information that Educational Alliance may provide the Vendor to assist the Vendor in developing a Proposal, to any other person or entity without the prior written approval of Educational Alliance. Material submitted that is considered confidential or proprietary must be clearly marked as such. If confidentiality cannot be afforded, Vendor will be notified and permitted to withdraw the material.

## 2.3 News Releases

Vendors who are submitting a Proposal are not at liberty to discuss this RFP outside Educational Alliance and its community. Neither party shall release the details of this RFP or subsequent contract without written permission from Educational Alliance.

## 2.4 No Contractual Relationship

Nothing contained in this RFP creates, nor shall be construed to create, any contractual relationship between Educational Alliance and any Vendor. Educational Alliance makes no commitment in or by virtue of this RFP to purchase any services from any Vendor, nor does receipt of any Vendor's Proposal place Educational Alliance in under obligation to award the Agreement to that or any other Vendor. Such commitments may be made only in and through a written Agreement signed by both parties after having a mandatory in-person interview.

## 2.5 Primary Contract Relationship

Educational Alliance will contract with the Vendor of the winning Proposal and Vendor will be known as the primary contractor. No subcontracting is allowed for the fulfillment of this agreement, without prior written approval of Educational Alliance.

## 2.6 Proposal Costs and Property Rights

Expenses incurred in preparing and presenting a Proposal is the sole responsibility of the Vendor and may not be charged to Educational Alliance in any way. By submitting a Proposal, Vendor agrees that the Proposal shall become the property of Educational Alliance.

## 2.7 Evaluation of Proposals

The evaluation of all Proposals will be based on a single submission by each individual Vendor. This submission may include multiple alternative approaches for consideration by Educational Alliance provided that they meet the requirements of this RFP. No revisions or amendments to the proposal will be accepted after submission unless requested and approved by Educational Alliance.

Once Educational Alliance has evaluated the submitted proposals, the finalists will be contacted and requested to do an onsite presentation of their solution at Educational Alliance or its designee's office.

Educational Alliance will use some or all the following criteria to evaluate Proposals (the order does not represent priority):

- The Vendor's experience and ability to provide reliable services
- The Vendor's ability to meet Educational Alliance's needs based on referrals
- The ability to integrate hardware and software products or services
- The overall quality and presentation of the Proposal
- The price of the Solution
- The overall business case impact
- Any third-party evaluations of the vendor's services
- Industry standing and expertise
- Feedback from references provided
- The compatibility of the proposal with the Vendor's contract and service level agreement

## 2.8 Basis for Award of Agreement

Educational Alliance reserves the right in its sole discretion and for any reason whatsoever, to accept, reject or terminate consideration at any time of any or all Proposals. Educational Alliance specifically reserves the right to contract with a Vendor that does not offer the services at the lowest price or with one or more companies that did not submit a Proposal and to modify the terms of the projected transaction or the specifications of the services at any time prior to execution of the Agreement.

## 2.9 Amendments to RFP

Educational Alliance reserves the right to amend, modify, or withdraw this RFP at any time. If the RFP is amended or modified, it will be in writing via email from Educational Alliance. Vendors are required to acknowledge all amendments via email

## 2.10 RFP Schedule

The schedule for this RFP is as follows:

RFP Issued:	March 25, 2020
Vendor's intention to respond by:	April 9, 2020
Last date to submit questions:	April 16, 2020
Answers provided by:	April 23, 2020
Proposal submission:	May 2, 2020
Finalist WebEx Interviews	May 11, 2020
Target date for Educational Alliance's decision:	May 22, 2020
Solution implementation:	June 10, 2020

## 2.11 Vendor Questions

Vendors should submit intention to respond and all questions about this RFP **via email** by the dates specified above to:

**Primary Contact: Joe Tarver – [rfp@edalliance.org](mailto:rfp@edalliance.org)**

It is Educational Alliance's intent to provide responses to all questions to all Vendors by the Answers provided by date listed above.

## 2.12 Acknowledgment of RFP Receipt

Within 5 business days of the receipt of this RFP Vendors must provide electronic acknowledgment (email) of the receipt of this RFP and intention to respond. This communication should be addressed to the attention of the Primary Contact at the address noted above.

# 3 Current Business & Technical Environment

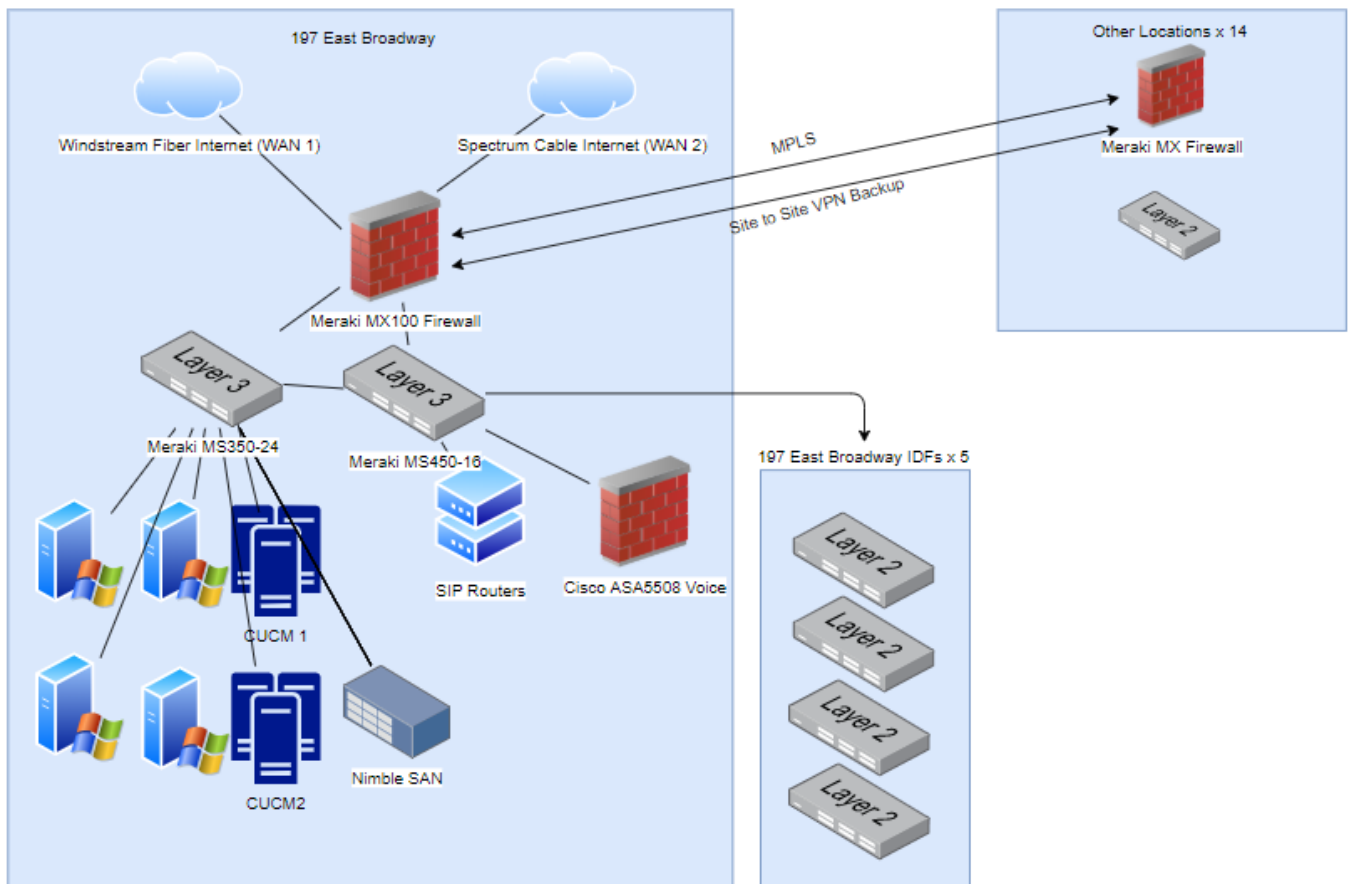
## 3.1 Overview

Educational Alliance delivers a variety of community services to the lower-east Manhattan area. The current full-time staff is around 495 with an additional 300+ part-time staff. As part of Educational Alliance’s good business practices, it has been deemed vital for Educational Alliance to hire a vendor to manage their IT systems and provide IT Services as if they were employed members of an internal IT department. Educational Alliance is looking for best of breed IT Services to ensure that all IT Systems are properly maintained and protected from internal and external threats. This should encompass an all-inclusive IT Services that fulfills the needs of a 900+ person organization. This should also include maintaining a secure infrastructure that is well managed and updated and providing friendly and efficient day-to-day support for all employees.

This document includes a profile of the current environment, from a business perspective as well as a technical point of view and includes detailed information. High-level business requirements have been defined, indicating the immediate focus for this initiative as well as the long-term strategy.

## 3.2 Network Environment

All locations currently have Meraki Firewalls, Switches and Wireless Access Points, with the exception being 17 Cisco Catalyst switches at the 197 East Broadway HQ Office. Most locations have dual internet connections. Varying speed Fiber is provided by Windstream for primary internet and MPLS connectivity) and Cable Internet provided by Spectrum for Backup, guest Wi-Fi and Site-to-Site VPN connectivity in the event the MPLS is down). All sites share the IT resources running from the 197 East Broadway Location. These IT resources consist of Servers (AD, DNS, DHCP, File, Print, Application) and Cisco UCM Voice Hardware.



For a full list of all IT Infrastructure hardware, please see the attached spreadsheet (EA Hardware List.xls)

At the current time, we are not budgeting for the replacement of any of this hardware for the next fiscal year, so all responses have to be specific to supporting all hardware, software and services in production with the exception of the following:

- Low-Voltage Cabling
- Electrician Work
- Audio/Visual



## 5 Proposal Submission / Response Format

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Educational Alliance reserves the right to reject Proposals received after the due date. Each Proposal shall constitute an offer, which remains valid for a minimum period of 90 days after the proposal submission date.

Proposals should be in PDF format. The Vendor's name should appear on the bottom of every page other than the cover page. Each page, other than the cover page, shall be numbered.

Educational Alliance requires Vendor to organize its Proposal in the following order:

- **Executive Summary:** Provide an overview of the company, size of our team, relevant certifications and differentiators. Vendors should limit the Executive Summary to a maximum of two pages.
- **Responses to Questions:** Provide concise responses to the Questions listed in the following sections, presented in the exact order as arranged in this document. Vendor must follow numbering sequence, use the same section titles and answer all questions in order for Vendor Proposal to be considered.
- **Pricing:** Provide detailed pricing using the pricing page provided.
- **Contracts and Service Level Agreements:** Please include a copy of the contract and Service Level Agreements that would be signed as a result of an awarded proposal.
- **Supplemental Information:** Any information that Vendor deems relevant to the proposed solution can be included as an Appendix. Please note: Do not include information unless it directly relates to the solution proposed in Vendor Proposal.

## 6. Question and Answer

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### 6.1. Primary Business Purpose

Please provide a brief statement of your organization's primary business purpose.

(response)

### 6.2. Corporate History

Please provide a brief history of your company.

(response)

### 6.3. Management Team Bios

Please provide brief biographies of your management team.

(response)

### 6.4. Services Offered

Describe the services offered by your organization, including any optional services that might be of interest to Educational Alliance.

(response)

### 6.5. Managed Service Viability

6.5.1. What is your company's core business strategy? What are your primary lines of business in terms of revenue? Where do Outsourced IT Services fit into your business strategy?

(response)

6.5.2. Provide details on how long you have offered MSP Services and any applicable certifications your organization holds.

(response)

6.5.3. Provide your Insurance details (amounts, coverage type, etc.)

(response)

## 6.6. Vision

6.6.1. Describe your company's vision and direction for MSP business

(response)

6.6.2. Describe, in detail, your company's approach to improving your MSP business

(response)

## 6.7. Security Practices

6.7.1. Provide detail on your *internal* security policy and procedures, documenting any industry standards that you have adopted or follow.

(response)

6.7.2. Have you had an independent review of your business such as penetration testing or phishing tests? Please provide detail on this review, including who executed it, when it was executed, scope of review, type of testing, frequency of testing and summary results. If possible, please provide the report.

(response)

6.7.3. If you haven't performed an independent review, are you planning to have a review performed in the future or are you in the process of having the review executed? If so, please provide detail on this review including who will be executing it, when it will be executed, scope of review, type of testing, and frequency of testing.

(response)

6.7.4. Do you perform internal reviews over your MSP business (how well are you meeting your contract obligations and SLAs)? If so, please provide detail on this review including who executed it, when it was executed, scope of review, type of testing, frequency of testing and summary results.

(response)

6.7.5. Describe your internal business continuity/disaster recovery policy.

(response)

## 6.8. Office Location and Employee Practices

- 6.8.1. How many physical offices do you have for staff that will be supporting us and where are they located?

(response)

- 6.8.2. Describe physical security safeguards around access to your office(s).

(response)

- 6.8.3. Describe the geographic area that you cover? Provide either the count or estimate of percentage of clients within 20 miles, 50 miles, 100 miles, outside of that. Describe if there will be any charges for travel and expenses.

(response)

- 6.8.4. Can we visit your offices? If so, what is the process for planning the visit?

(response)

- 6.8.5. Describe your approach to background checks or screening you perform on employees, contractors, consultants and vendors associated with any aspect of your MSP offering.

(response)

## 6.9. Support Model

- 6.9.1. What is the process for clients to communicate requests and how are they prioritized?

(response)

- 6.9.2. Do you offer 24/7/365 support? If so, how do you provide 24/7? If not, what are your hours? Are there extra costs for 24/7?

(response)

- 6.9.3. Do you use a ticketing system? Which system? Do clients get access to a client portal? Can clients submit tickets online and/or via email? Can you provide automated or manual reports on a weekly/monthly basis of all tickets and resolutions?

(response)

6.9.4. What are your typical response times for issues? Do you have an SLA? If so, please provide it.

(response)

6.9.5. How do you provide support to larger clients? Do you assign a specific engineer to a client?

(response)

6.9.6. How do you maintain a proactive relationship with clients going forward and how frequently do you recommend a service review?

(response)

6.9.7. Do you provide monthly/quarterly meetings with management to discuss IT Strategy and IT Budgets? Do you help clients put together an IT Budget?

(response)

6.9.8. What is the typical length of your support contract, and do you allow early contract termination?

(response)

6.9.9. What is your pricing model? Do you provide an all-inclusive model per employee/PC? How do you handle projects? Due to the nature of funding of non-profits, it is very important for Educational Alliance to have a fixed IT budget.

(response)

6.9.10. Can you provide examples of items not covered under your managed services offering (charges above and beyond the monthly fee)?

(response)

6.9.11. How do you document your client's environments? Do you provide your clients with this documentation?

(response)

6.9.12. How do you protect the users from themselves? What processes/policies do you have in-place to make sure computers do not get infected with malware/viruses?

(response)

6.9.13. Describe the process for onboarding a new client? Include how it is you work with the existing provider to make the transition smooth.

(response)

## 6.10. Team Structure

6.10.1. What is the support transition process as the client moves through the initial project and into day-to-day support services?

(response)

6.10.2. Describe the helpdesk function. When a client has an issue, what is the process they are to follow to address the issue? Describe this with respect to calling, emailing, business hours and after hours.

(response)

6.10.3. How do you ensure your engineers are familiar with client environments?

(response)

6.10.4. How do you ensure that clients don't see a different technician each time they require support?

(response)

6.10.5. What is the escalation process if we have an urgent issue not handled outside of the SLA?

(response)

6.10.6. How do you dispatch support when additional on-site help is needed?

(response)

## 6.11. Service Offering

6.11.1. Please provide details on your all-inclusive service offering. Is everything included? What is not included? Please provide as much detail as possible as this will be a key decision question.

(response)

6.11.2. What data backup service and strategy do you implement? How do you monitor backups? Do you test backups?

(response)

- 6.11.3. What antivirus product do you use for your MSP clients? Do you provide regular reports of Antivirus being up to date (software and definition files) and Windows updates being up to date?

(response)

- 6.11.4. How do you manage Windows patch management for your clients? Do you treat servers differently than workstations? If so, describe.

(response)

- 6.11.5. What technology do you use to provide remote support?

(response)

- 6.11.6. How do you monitor client equipment for uptime, hardware failures, services stopped, viruses, Internet attacks?

(response)

- 6.11.7. What are your procedures and systems to secure client sites? What firewalls do you support? Do you perform any software/firmware updates as part of your service offering (note if it is extra cost)? Do you perform any vulnerability testing and results as part of your service offering (note if it is extra cost)?

(response)

- 6.11.8. Do you provide custom software development services? Please provide details if so.

(response)

- 6.11.9. How do you keep client passwords?

(response)

## 6.12. References

- 6.12.1. Provide client references. For client references, provide a minimum of three references accounts of similar size. The client references must be current clients and have at least one year of experience with your MSP service.

(response)

## 7. Pricing

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**PART 1: IT Services** - Please provide monthly pricing for a 36-month period for the unlimited remote AND On-Site IT support. We are requesting that there always be (2) full-time on-site employees, staffed in our HQ office and traveling between the 14 locations) from 8:00am-7:00pm Monday – Friday, in addition to ad-hoc outside hours.

Please ensure all costs are reflected, including “implied” or non-explicit costs. Due to the nature of the various sizes of the organizations, please provide key costs in a per location, device, employee format (depending on the pricing model you support). If there is tiered pricing based on the user/device count, please provide your tiers and discounts.

(response)

**PART 2: vCISO Services** - Virtual Chief Information Security Officer Services for one of our locations – In addition to part 1. This location is required to maintain a HIPAA-compliant security environment. All bidders must bid on part 2 for **20 monthly hours** for 36 months, providing the following vCISO services:

- Information Security Management and Leadership
- Policy Creation/Expansion
- Plan of Action and Milestone Creation/Expansion
- Incident Response Plan Development / Co-ordination
- Information Security Control Implementation
- Business Continuity Program Review
- 3<sup>rd</sup> Party Management Review
- Presentations upon request for Board of Directors, Committee, and other organizational units.