

Request for Proposal

Information & Technology Support

March 17, 2017

Issued by:

Community Foundation for Kingston & Area (CFKA)

Contact:

Mora Chatterson

mora@cfka.org

613.546.9696

Introduction & Background

The Community Foundation for Kingston & Area (“CFKA”) is a local charitable organization that connects the generosity of donors with the energy, ideas and time of people in the community. The Foundation encourages individuals and organizations to establish and help grow permanent endowments, which allows us to invest in our community in perpetuity. Since 1995 it has made financial grants to a wide range of charities, promoted philanthropy, and built connections between donors and good works. It acts as a catalyst amongst organization and collaborates both formally and informally, with many different organizations to improve life in Kingston and Area.

CFKA has a permanent staff team of four and engages over 70 volunteers on its Board of Directors, various committees, and project/office volunteers. Its office is located downtown Kingston (currently 165 Ontario Street) but will be moving early 2018 (location TBD but will be within range of the downtown core).

We are in need of ongoing Information & Technology (IT) support and are accepting proposals in response to this Request for Proposal (“RPF”) in order to find a qualified contractor to provide ongoing IT support and advice.

The objective of this RFP is to locate a contractor that will provide the best overall value to CFKA for supporting its IT resource.

CFKA’s overall goal for IT support is to ensure that our IT systems are operating securely, efficiently, effectively, and safely.

CFKA’s requirements for IT support are:

1. To ensure that our systems are operating efficiently, effectively, and safely, namely that:
 - a. Systems are operating at good speed
 - b. Donor and financial database, FIMS, is operating effectively
 - c. Emails and calendaring are operating properly (using MS365)
 - d. Staff and volunteers have reliable access to files according to various permission levels

- e. The server and wireless routers are configured (or “hardened”) to mitigate against security vulnerabilities
 - f. Proper anti-virus and malware protection are in place and updated as needed
 - g. Private and confidential information is always secure and only accessible by those with the correct permissions
2. Data is properly and securely backed up, and data/systems can be rebuilt quickly if needed
 3. Systems and data are secure; in compliance with cyber security and privacy laws and best practices; and that our cyber protection adapts/evolves as required
 4. Provide emergency response for critical issues/business interrupting activities
 5. Provide access to a knowledgeable and trusted source of information for assessing our current systems and advising on our future IT activities (such as purchasing of hardware/software, file share systems, evaluating future migration of data files from local sever to the cloud (email has already been migrated to MS365), taking into consideration necessity to protect private information)
 6. Providing ad-hoc IT assistance for other issues as required (i.e. things like installing double monitors)

The contractor to work with us to identify and provide the needed IT solutions so we can focus on what we do best – serving our community; knowing that the IT support is in place for us to do our jobs well, and that our donor and financial information is secure. We are looking to find the right contractor to provide these services on a long-term basis.

While price is a significant factor (as a charitable organization we are very cognizant of using our donors’ donations wisely), other criteria will form the basis of our award decision as more fully described in the Evaluation Factors section of this Request for Proposal below.

Submission Guidelines & Requirements

The following submission guidelines & requirements apply to this Request for Proposal:

1. Only qualified individuals or firms with prior experience supporting systems and organizations similar to ours should submit proposals in response to this Request for Proposal
2. Qualifications of the team members to provide the services should be provided
3. Each of the proposed team members must hold Enhanced Security Clearance (or higher) and will be required to sign a confidentiality agreement
4. Bidders must list at least two to three (2-3) references for projects/clients they serve with similar needs to ours
5. A price proposal must be provided that includes pricing for the services to be provided, either as a fixed price (including monthly maintenance costs) or hourly rates along with an estimated total number of hours, or a combination of the two

6. Proposals must be signed by a representative that is authorized to commit bidder's company
7. If you have a standard set of terms and conditions, please submit them with your proposal. All terms and conditions will be subject to negotiation
- 8. Proposals must be received prior to 8:00 am March 27, 2017 to be considered**

Current IT Products

- Five (5) desktop computers; two (2) laptops
- Microsoft Windows Small Business Server 2011
 - Microsoft Exchange Server 2010
 - Microsoft SharePoint 2010
 - Microsoft SQL Server 2008
 - 1 Active Directory domain
- Server configured with four drives with varying access permission levels: 1. open access (for all staff and volunteers); 2. for all staff; 3. those with access to financial records and 4. the Executive Director only
- Donor/Financial Database "FIMS" (Financial Information Management System; this is a complex database for which we pay an annual licensing fee, which includes support, however we need an on-site IT person to liaise with their support to ensure the system is operating at maximum efficiency/speed and is backed up properly.
- The server is a custom-built machine with a single quad-core Intel Xeon E31220 CPU, 24 GB of ram and 1TB of hard drive space
- 2 x My Book Premium Storage Complete Backup and Security (2TB)
- Microsoft Office 365 Instance: 5 licenses
- Wireless router – for volunteers and mobile devices only
- Adobe Creative Suite (cloud subscription)
- Symantec Endpoint Protection v 12.1.3001.165
- Malwarebytes Anti-Malware Home Premium v 2.2.1.1043
- Spiceworks Desktop v 7.5.00074

IT Support Description

The support required is as follows:

1. Provide ongoing monthly IT support including:

- 1.1. Monthly health check (to ensure all systems operating correctly, securely, reliably and efficiently, software reasonably up to date (i.e., within vendor supported levels, DAT files current, etc);

- 1.2. Ensuring reliable internet access (currently provided through Cogeco)
- 1.3. Software updates installed (within a given version – so NOT, as an example, Windows 7 to Windows 10);
- 1.4. Simple software installs;
- 1.5. Maintaining adequate documentation describing the systems (“the configuration”) and providing instructions for staff on how to troubleshoot common issues that may arise
- 1.6. Providing adequate “Break/Fix” response time during regular business hours (Monday – Friday, 8:30 am – 4:30 pm);

2. Deliver one-time projects such as:

- 2.1. Assessing why systems currently operating very slowly (individual machines accessing FIMS, housed on the server) (to be completed immediately)
- 2.2. Assessing current security of our systems (to be completed immediately)
- 2.3. Assessing current health of our server; needs now that email has been moved to the cloud. Advice on a) plans for now and b) explore desirability of replacing server and moving data to MS365 cloud (considering privacy requirements, needs for our current FIMS database)
- 2.4. Overseeing move of computer systems when the office relocates early 2018
- 2.5. Upgrades to software (e.g. major version upgrade such as Windows 7 to 10);
- 2.6. Make recommendations for improvements and upgrades such as but not limited to advise on moving from an in-house server to MS 365 (the “cloud”) for our storage needs
- 2.7. SQL version change (might involve unloading and re-loading the database)

Contractor’s Proposal Scope

CFKA invites proposals from qualified contractors for all or part of the work as described above.

RFP Timelines

The target RFP timeline is as follows:

RFP issued	March 17, 2017
Due Date for submissions	March 27, 2017, 8:30 am
Review/Evaluation of submissions	March 27-31
Meetings with shortlist of candidates	March 28-31
Contract Award / Notification to Unsuccessful Bidders	April 7

Note: our intent is to hire the successful contractor as soon as possible; the timelines above are estimated; we reserve the right to shorten or extend the evaluation and contract awards dates.

Evaluation Factors

CFKA will rate proposals based on the following factors:

1. Responsiveness to the requirements set forth in this RFP
2. Technical expertise of the contractor's team
3. Security clearance of each of the contractor's team members
4. Relevant past performance/experience
5. References
6. Break/Fix response time for failures for business critical activities
7. Cost
8. Ability to communicate effectively with non-technical staff

This Request for Proposal is non-binding. CFKA reserves the right to award to the bidder that presents the best value to the Foundation as determined solely by the Foundation in its absolute discretion.