Request for Proposal

Technology Management Services

and

Virtual CIO Services

April 1, 2021

Catholic Charities Maine
P.O. Box 10660
Portland, ME 04104-6060

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Purpose of this Request

The purpose of this RFP is to secure services that provides Catholic Charities Maine (CCM) with Technology Management Services and Comprehensive Support Services, at an agreed-upon cost. This document (the "RFP") is intended to provide details of the services required by CCM.

Contact Information

All questions and inquiries regarding this RFP should be directed by email to:

Amanda Johnson, Contracts Supervisor
Email: ajohnson@ccmaine.org

Timeline of Events

May 7, 2021	PROPOSALS ARE DUE
May 8 – May 24, 2021	CCM will review proposals, conduct interviews with potential Vendors (if necessary) and make their decision
May 28, 2021	Expected date of notification to all Vendors submitting an RFP

(CCM reserves the right to extend their review process and/or request additional proposals as they deem necessary in order to satisfactorily fulfill the services outlined in this RFP.)

Submission of Proposal

Six (6) copies of each proposal must be submitted to CCM by May 7, 2021 at 4:00pm. Submission should be made to the following address.

Mailing Address:
Catholic Charities Maine
Attn: Amanda Johnson
P.O. Box 10660
Portland, ME 04104-6060

Physical Address:
Catholic Charities Maine
Attn: Amanda Johnson
307 Congress Street
Portland, ME 04101

Please write "IT SERVICES RFP" on the lower right-hand corner of the package.

Proposals must be received at this address by the due date and time for them to be considered. CCM is not responsible for mail delivery issues.

General Information

Company Background

Catholic Charities Maine is one of the largest statewide, private, nonprofit, social service agencies in Maine and is committed to improving the quality of life for the individual, the family and the community.

Catholic Charities Mission reads, "Inspired by scripture and the Church's social teaching, Catholic Charities empowers and strengthens individuals and families of all faiths by providing innovative community-based social services throughout Maine". Our services impact more than 55,000 people statewide by:

- Providing food assistance to individuals and families in Aroostook County
- resettling refugees in Maine by helping them find housing, jobs, and referrals to available services
- Providing individuals and businesses statewide with language interpretation and translation services
- Providing education, training, and support to adults to help them establish and maintain employment
- Providing individuals and families dealing with issues related to drugs or alcohol addiction support and counseling services
- Supported elderly and disabled individuals for them to be able to remain living independently in their home
- Providing teachers and resources to blind and visually impaired children
- Providing children with high-quality, developmentally appropriate childcare and education so parents could work or attend school
- Providing children, adolescents, and adults with quality dental and orthodontic care

- Providing case management services to children with mental illness, mental retardation, and developmental disorders to help them best utilize strengths in their family and community resources
- Providing adults with mental illness case management support to help them access health care and community services and fully live their lives
- Providing at-risk youths and their families with intervention and support to prevent them from further involvement with the legal or mental health system
- Providing children with nutritious meals and snacks by their childcare providers through the through the USDA Food Program.
- Operation of 4 thrift stores between Caribou and Sanford.

The services above are provided by approximately 225 Full-time, 50 Part-time and 325 On-call employees at locations across the State, listed below. The delivery of these diverse services requires the use of a large amount of software and hardware. CCM utilizes approximately 288 computers. These include desktops, laptops and thin clients.

Major software utilized by CCM includes (but is not limited to):

Citrix	NetLearning
Microsoft Office 365 Suite	Consolidated Communications Hosted Phone systems
Duxbury	Dentrix
Great Plains Dynamics	eRSP (interpreter & translation tracking)
Square	Apple Related Interface
Adobe Products	Dolphin Imaging
Minute Menu	Salsa Labs
Dexis	Cerner Community Behavioral Health (aka Anasazi Software)
Fax Maker	ProCare
Credible Behavioral Health	

CCM Locations: Current locations include (subject to change)

1066 Kenduskeag Ave., Bangor	171 Congress Ave., Bath
307 Congress St., Portland	14 Old Van Buren Rd., Caribou
420 Cumberland Ave, Portland	24 Dunn St., Auburn
87 High St., Portland	56 State St., Presque Isle
80 Sherman St., Portland	155 US Route 1., Monticello
1364 Main St., Sanford	5 Lowell St., Calais
229 Pool St., Biddeford	66 Western Ave., Fairfield
136 State St., Augusta	
270 Minot Ave., Auburn	

Scope of Work

In summary, the services being requested in this RFP would include the following:

1. **Support Services**: The services indicated below are currently being delivered in the form of "help desk" services; however, we recognize that there may be other ways of delivering these same services. We encourage vendors responding to this RFP to propose the best and most efficient way of delivering these services whether it is in the form of a "help desk" or some other method.

   Support Services will be provided on a 7x24 basis with an unlimited number of calls. Expectations of Support Services include, but are not limited to the following:
   a. Resolve all user password issues on various CCM applications and systems, including any adds /moves /deletes.
   b. Reset application sessions in Citrix when necessary.
   c. Assist users with issues related to device or application failures.
   d. Assist users with a best-effort approach on day-to-day computing questions as they directly relate to the successful operation of applications that are supported by CCM and fall under the direct responsibility of Vendor within the context of this agreement.
   e. Assist remote users (whether it be from home or any other location) with network issues.
   f. Escalate all issues that may be directly related to back-end failures across the infrastructure.
   g. Expected Support Service Levels: Vendors should indicate what benchmarks, including source of such industry standards would be used to measure the effectiveness of the support services. Expected Service Resolutions: Vendors should indicate what benchmarks, including source of such industry standards, would be used to measure the resolution of issues requiring support services as well as response time. How would issues get resolved that cannot be addressed quickly?

2. **IT Services: Proactive Maintenance and repair of systems and software is critical for CCM to meet its business and contractual obligations in a time effective manner.** All computerized/networking equipment and associated applications to be monitored and serviced on a 7x24 basis,
   a. **Back End Applications –** OS applications and utilities.
   b. **Corrective maintenance—**Defined as activities associated with root-cause analysis and patch management resolution:
      i. **Root-cause analysis—**Analysis of the root causes of problems. Vendor will respond within two (2) hours remotely or four (4) hours on-site. Problems will be reviewed to determine their root cause, measures will be taken to correct the sources of the problem(s), and reports will be prepared and distributed in a timely fashion. Should parts be required on failed systems out of warranty, CCM will be responsible for the cost

of parts and shipping needed to restore the system to normal operation.

1. <u>Items classified as top priority processes for issue resolution include, but are not limited to:</u>
   a. All **LAN / WAN** structures.
   b. All **Windows Operating Systems** within CCM's outsourced server environment, with an emphasis on CCM's underlying **Active Directory** and associated processes.
   c. **Pending applicability, Citrix** and all affiliated processes, including **Citrix Access Gateway and Web Interface Server** and/or Remote Desktop Services and all affiliate processes.
   d. The **Exchange E-Mail Server**
   e. All critical instances of **Internet Information Services (IIS)**.
   f. Al critical instances of **Microsoft SQL**.
   g. Critical software for payroll processing (ADP) and client database Cerner Community Behavioral Health
   h. Corporate **Antivirus** processes.
   i. E-Mail **Anti-Spam** appliance.
   j. All **System Backup** processes.

   ii. **Patch management—**Defined as the recommended update of any system that does not comply with current manufacturer security or functionality specifications. This includes operating systems and hardware firmware patch management to equipment covered under this service level Agreement.

c. **Ticket status updates—**Vendor will provide problem tickets and status from its location, or remotely from other satellite Support centers within Vendor to CCM's primary point of contact. CCM would receive a weekly report giving updates.

d. **Disaster Recovery –** Vendor will assess disaster recovery strategies in conjunction with CCM and make practical recommendations and changes to system backup strategies as necessary.

e. **Preventative Maintenance—**For computerized/network equipment covered under this Agreement, and when corrective maintenance activities are low, work will be conducted to analyze and take steps to prevent potential problems.
   i. An agreed-upon Maintenance Window will be defined and used for all proactive infrastructure changes.

f. **Incident Management—**Recording, storing, and retrieval of incidents to assist in the resolution of problems will be maintained by Vendor. Using this approach, the need for CCM to manage problems will be significantly reduced, thus saving CCM resources, and increasing user satisfaction and quality of service delivered. However, CCM would like postmortem reporting on the issues as they are resolved outlining what happened, users responsible, etc.

g. **Proactive System Monitoring** of server and networking components 7x24-- Vendor will monitor CCM's computerized/network infrastructure using specialized "device agents" and SNMP trapping's that notify us (and optionally CCM) should the tool detect any system malfunction or identify abnormal system behaviors. For example, the system will alert us if there are errors writing to the hard drive, that disk space is low, that the systems are over worked, or that key system services have failed. This monitoring solution tracks ongoing performance metrics, change management, as well as OS issues and failures as mentioned earlier.
   i. **Vendors should include examples of standard thresholds for "alert types" and response time by "alert status".**
h. **Back End Applications** – Back end applications and services listed below covered under this request include, but are not limited to:
   i. Day to day break-fix support of application software that Vendor has no expertise will be excluded and any Help Desk tickets generated on these products and services will be coordinated with the appropriate vendor, by outsourced IT provider, or turned back to CCM designated contact(s) for intervention:
   ii. Credible behavioral health electronic health record
   iii. Microsoft Dynamics Great Plains
   iv. ADP
   v. Consolidated Communications Inc.
   vi. NetLearning
   vii. Microsoft Retail Management Systems
i. **Other IT services:** Vendor needs to be able to respond to other IT needs that may arise whether or not they are specifically listed above.

3. **Data Center**
   Data Center is currently located in Brunswick ME and hosted by FirstLight.

OTHER VENDOR REQUIREMENTS:
1. Respondent must have SOC Type II Certification
2. Respondent must have demonstrated HIPAA training compliance in place, for at least two years
3. Respondent must have an information security policy handbook
4. Demonstrated compliance program to successfully meet the terms of executed BAA.

Vendor shall be and remain responsible to CCM for the performance of Services, whether performed by Vendor or by any subcontractors. Vendor will provide to CCM the benefit of all representations, warranties, Service Level Agreements and indemnities made subcontractors to Vendor.

CCM is interested in Vendors performing the services indicated by the Scope of Work in the most efficient manner possible. CCM is open to ways of doing business other than the ways specifically mentioned in the Scope of Work above if it can effectively accomplish the IT goals of the organization.

CCM reserves the right to contract with one or more Vendors or no Vendors if no suitable Vendor is found to provide the services indicated above.

Contract Term

The term of the contract that will be awarded at the end of this request process will be for one (2) year with two (2) additional one (1) year renewals with demonstrated adherence to contract terms.   At the end of the initial two (2) year contract term fee structure will be evaluated and discussed based upon changes in CCM's needs over the two (2) year initial contract term such as users, locations, server vs. cloud hosted, etc....and subject to change as agreed upon by both parties. A Business Associate Agreement will be required as part of this contract.

Proposal Information Required

This section specifies the requirements that submitting vendors must address in their proposal. For each requirement provide a concise, complete and accurate response. If desired, additional supporting materials can be attached as an appendix.

1. Provide an overview of your company, including date of incorporation, operating locations, number of employees.

2. Describe your organizational structure and explain how your organization qualifies to deliver the requirements outlined in this RFP.

3. Describe, in general, the types of organizations with which you have experience and based on your current swath of clients, where does a company of CCM's size fall within the mix?

4. Describe your plan to meet the needs CCM has outlined in this RFP. What benchmarks would there be to measure performance?

5. What makes your company different than other vendors delivering similar services?

6. Describe the training and experience of the employees that will be performing services under this RFP.

7. Provide a minimum of three (3) references including the names of persons who may be contacted, position of person, address and phone numbers where services similar in scope to the requirements of this RFP have been provided.

8. Provide a selection of resumes or bios for the types of resources you would anticipate assigning to CCM were you to be awarded the contract associated with this RFP.

9. Provide a cost proposal associated with the delivery of services outlined in the RFP. This section must break out the costs as follows:
   - Support Services
   - IT Services
   CCM will pay for services under the contract resulting from this RFP on a monthly basis. Separate pricing for each of the service categories is required as CCM may elect to contract for some or all the service categories above. Pricing for bundled services may be submitted in addition to the separate pricing.

10. Address how you would handle the transition of services from our current vendor if you were awarded the RFP.

Scoring Criteria

Proposals will be scored on a 100-point scale and categories will be weighted as follows:

CATEGORY	WEIGHT
Company Overview, Structure, and Proposed Staffing	5
Experience	25
Proposed Services to Meet CCM Needs	35
Cost	30
Transition Plan	5