

The document below is an EXAMPLE of an RFP an organization should use to acquire about Managed IT Services. Please note that sections listed in red are sections that either aren't completed or included in the document. This document will be completely overhauled to offer a refined and more straight forward explanation of things. DO NOT COPY AND PASTE AND REUSE EXACTLY AS IS. Various Sections are missing

BUSINESS AND TECHNOLOGY ADVISORY SERVICES (Fancy Way of Saying Managed IT Services)

SECTION I. GENERAL TERMS AND CONDITIONS

A. GENERAL CONDITIONS

Providers are required to submit their responses in combination with the following expressed conditions:

- 1) Respondents shall thoroughly read the specifications and shall examine any graphics which may be incorporated into the RFP documents. As RFP documents frequently change for each request, it is the bidder's responsibility to read this solicitation in its entirety. Organization Requesting Proposals (referred to herein as **ORP**) is not obligated to identify either minimal or substantial modifications to the RFP document.
- 2) Respondents are required to state exactly what they intend to furnish via this request and must indicate any variances to the terms, conditions, and specifications of this Bid; no matter how slight. If variations are not stated in the Respondent's response, it shall be construed that the Respondent's response fully complies with all conditions identified in this RFP.
- 3) All information contained in the RFP, including addendums and modifications thereto, reflect the best and most accurate information available to **ORP** at the time of RFP preparation.
- 4) The RFP does not obligate **ORP** to contract for services specified herein. The respondent is advised that any resulting contract is valid and enforceable only if sufficient funds have been appropriated to conduct the stipulated undertaking. Additionally, that contract is subject to any additional restrictions, limitations, or conditions enacted which may affect the provisions, terms, or funding of the contract in a timely manner.
- 5) Published questions and answers, and any other pertinent information and changes, will be considered an addendum to the RFP. If the changes are of major or extensive concern, **ORP** may, at its discretion, withdraw this RFP, and may/may not issue a follow-up replacement RFP. Failure to incorporate addenda in submitted responses may result in the Respondent's response being categorized as Non-Responsive, and may result in disqualification.
- 6) Responses must be based solely on this RFP. **ORP** is not bound by oral explanations or instructions given during the procurement process, unless specifically included in this RFP, or as a subsequent addendum issued prior to the closing date.
- 7) Respondents are advised that **ORP** strongly endorses the participation and utilization of local vendors in its purchasing efforts. Accordingly, responses of equal price and quality will be awarded to the Respondent residing within **ORP**'s geographic boundaries when available. This policy does not prohibit Respondents who reside outside of **ORP**'s boundaries from participating in the purchasing process as long as these Respondents can offer quality services at competitive pricing.

- 8) Submitted responses must be valid for at least ninety (90) days after the closing date of this RFP.
- 9) The Respondent must state clearly any potential conflicts of interest, and any current or past relationship with **ORP**. The response must include a completed, Vendor Disclosure Statement using the form described in Section **I.D.2 (Selection Criteria)** of this RFP. The Vendor Disclosure Statement must be signed by a duly authorized officer of the Respondent organization.
- 10) Respondents are solely responsible for the cost of preparing their responses. Neither **ORP** has any liability for any costs incurred by a prospective Respondent, responding to this RFP for the preparation, production, presentation, or any other work performed prior to the issuance of a contract. If this RFP is cancelled at any time in the response process, Respondents may not collect any costs incurred in preparation of their responses.
- 11) Where there appears to be variances or conflicts between General Conditions and Special Conditions and/or Technical Specifications outlined in this request, the Special Conditions and/or Technical Specifications prevail.

B. PRICES CONTAINED IN RFP

- 1) Prices must be fixed and firm to the extent required in the Special Conditions.
- 2) Respondents will neither include Federal, State, nor applicable Local excise or sales tax in prices as **ORP** is exempt from payment of such taxes. **(Relevant ONLY if your organization is a state or federal government agency)**
- 3) All costs associated with travel by the Respondent for the project, as well as associated costs for lodging and per diem, must be included as part of the Respondent's pricing, but does not need to be broken out separately. The Respondent is expected to cover travel and related costs for the project, and will not be reimbursed. All requests for consideration of alternative work sites based upon project roles and/or limited client/user interaction must be reviewed by **ORP**, and require **ORP**'s express approval.

C. PREPARATION AND SUBMISSION OF RFP

- 1) The response must be typed or legibly printed with ink. All written corrections by the Respondent must be initialed in ink by the authorized agent.
- 2) Responses must contain a signature of an authorized agent of the Respondent in the space provided. If the Respondent's authorized agent fails to sign the response, its response may be considered a voided offer and not be considered.
- 3) All Respondents should respond to the RFP utilizing the format described in this section providing, at a minimum, the information requested for each section. Respondent must expressly set forth in response to Section **II.E (Exceptions)** any exception(s) it has to the RFP requirements. Any exception(s) not expressly set forth will be deemed waived.
- 4) The response and all required documents shall be submitted by **< insert desired method >**
- 5) Whether **<emailed, mailed or hand delivered>**, responses must be received in the Office of **ORP** at **<Enter your organizations address here>**, no later than **< date.>** The response and documentation become the property of **ORP** and will not be returned. Late submissions shall be deemed Non-Responsive.
- 6) It is the responsibility of each Respondent to ensure that the response is delivered at the proper time and place.

It is the intent of **ORP** to evaluate all responses in a standardized and objective manner. For this reason, responses that do not conform to the format specified in this RFP, and which are not delivered as specified in this RFP, will not be considered.

7) Should a Respondent desire to utilize a standard form contract in the provision of the services specified herein, it should include the standard form contract with its response. If any term or condition of its standard form contract is non-negotiable, such term or condition should be clearly identified. Non-negotiable terms or conditions determined to be unacceptable to **ORP** may result in the disqualification of the Respondent submitting the response.

D. EVALUATION PROCESS

1) PROCEDURE

After receipt of the responses, **ORP** will evaluate all responses to determine those Respondents which are qualified, and then based solely on its own judgement, will further determine which has offered the best response to meet requirements. During the evaluation process, some respondents may be required to make oral presentations. Upon selection of the preferred Respondent, **ORP** may initiate negotiations for contract terms and conditions, including fees. **ORP** reserves the right to award or reject any of the responses, or any parts thereof, received in response to this RFP, as well as solicit additional responses, if it is considered to be in the best interests of **ORP**.

2) SELECTION CRITERIA

Responses will be evaluated based upon the contents of the response, information received from other sources, and public knowledge. Selection will be based on all factors listed below, and others implied within this RFP.

The presentation sequence of the criteria below does not indicate their precedence. The Respondent must satisfy **ORP**'s requirements in a) through c) to be considered in the price competition in d).

- a) Response must meet the format as presented in Section I.C. (Preparation and Submission of RFP) for designating the ability of the Respondent to satisfy each requirement.
- b) Qualifications: These criteria include an evaluation of:
 - i) qualification of Respondent's past experience
 - ii) ability of the Respondent to perform the terms of the RFP
 - iii) quality and relevancy of the services proposed
- c) Support: This criterion includes an evaluation of any and all support proposed by the Respondent.
- d) Cost: **ORP** awards contracts to the best value Respondent responding to the RFP that in **ORP**'s determination, meets or exceeds the criteria specified for selection.

3) DISQUALIFICATION CRITERIA

- a) If an award is made by **ORP**, and prior to execution of a contract subsequent information indicates that the award was not in the best interests of **ORP**, or that parties are unable to come to agreement on terms, **ORP** reserves the right to rescind the award, and either award the contract to another Respondent candidate or reject all responses. If the Respondent is unable to comply with any or all terms of this response, the contract will be null and void.
- b) A response containing false or misleading statements, or which provides references not supporting attributes or conditions claimed by a Respondent, may be disqualified solely at **ORP**'s discretion.
- c) A response may be disqualified if it is conditional, incomplete, contains any alterations of form or other

irregularities, or is judged to constitute a deviation from the RFP requirements.

- d) A response without an authorized agent's signature may not be considered.
- e) A response submitted after the deadline may be disqualified.

SECTION II. SPECIAL CONDITIONS

A. PURPOSE

The **Your Organization Here** solicits responses from qualified Respondents interested in advising **ORP** on how to best use information technology in achieving business objectives. Respondent will also be required to manage, implement, deploy, and administer proposed systems on behalf of **ORP**.

B. BACKGROUND

INSERT BACKGROUND INFORMATION ABOUT YOUR ORGANIZATION AND THE DUTIES REQUIRED OF THE ORGANIZATION

C. RESPONDENT INFORMATION

The Respondent must address each and all of the following items within the RFP response.

1) RESPONDENT BACKGROUND

Provide a brief, general background description of the Respondent's business, including:

- a) full business name, any other name the Respondent uses (i.e., DBA, trade name, etc.)
- b) physical address, phone number, and website of the headquarters office
- c) name of office or branch to serve **ORP**
- d) mailing address, phone number, and website of said office or branch
- e) year in which the business was first organized
- f) services the business provides

2) BUSINESS EMPLOYEES

Provide a brief description of the Respondent's employees, including:

- a) number of full-time employees
- b) number of part-time employees
- c) number of any employees projected to hire in order to fulfill this RFP
- d) number, role, and resume of each employee to actively perform the services required in this RFP.

3) SUBCONTRACTORS

Any subcontractor employed by the Respondent in the course of this project must be clearly identified and documented with organizational information as requested in **Section II.C.2 (Business Employees)** of this RFP.

4) REFERENCES

Provide a history of the Respondent's experience in delivering similar services as outlined in this RFP. A minimum of one (1) reference shall be from previous **RELATED INDUSTRY** work. Include the following information for three (3), but no more than five (5), references for operational services performed within the last three (3) years:

- a) name of business, organization or agency
- b) a brief description of the service(s) you provide(d)
- c) dates of service
- d) business's information (i.e., address, phone number, and website, if applicable)
- e) client contact information (i.e., person's title, name, phone number, email address)

ORP reserves the right to contact each client listed in the response.

D) SCOPE OF WORK

1) RESPONSE REQUIREMENTS

Respondents must indicate whether or not their services satisfy each requirement listed in **Section II**. The response to each separate requirement should indicate if the requirement is currently met within the Respondent's proposed application, with an explanation of how the requirement is met. If any requirement is not met, the Respondent must indicate the extent of effort necessary to make the application conform to the stated requirements.

2) REQUIREMENTS

- a) This will include providing **ORP** with guidance in the following areas:
 - i) refining business processes utilizing information technology systems
 - ii) optimizing technology usage and performance
 - iii) creating, building, and maintaining resiliency in **ORP** information technology systems.
- b) Administration and monitoring of **<number>** workstations, **<number>** servers, and a perimeter security posture for its stationary and roaming staff. This will include, but not limited to the following tasks:
 - i) Monitoring device availability, health, and performance indicators.
 - ii) Managing patches, user accounts, email accounts, and device installation, configuration, and troubleshooting.
 - iii) Providing network-based web content filtering, inline anti-virus, and inline intrusion detection and prevention services.
 - iv) Delivering monthly report of activities with supporting graphics related to technology changes and usage data collection from Tasks b)i), ii), and iii). These reports will be discussed at on-site quarterly meetings.
- c) Consultation regarding business process review and optimization such as recommendations for the improvement of current licensure procedures, interaction between software applications for operational work flow obstruction, review of electronic collection and storage processes for paper documents, and review of standard operating procedures for disaster recovery needs.
- d) Help desk support must be available 24 hours a day, 7 days a week.

3) ADDITIONAL REQUIREMENTS

- a) At least one letter of recommendation (LOR) from **INSERT LOR REQUIREMENTS HERE**
- b) successfully cleared criminal and financial background check on all employees working on the contract.
- c) **ORP** requires, at minimum, the following certificates and experience by at least two staff who will actively participate in this project:

- Information Technology Infrastructure Library v3 Foundation
- CompTIA Network+ CE
- CompTIA Security+ CE
- Advanced, Expert or Professional Level vendor certification in the products implemented for perimeter security posture
- Microsoft Certified Technology Specialist (MCTS): Windows 7-Configuration
- Microsoft Certified Technology Specialist (MCTS): Windows Server 2008 (2012) Active Directory, Configuring
- Microsoft Certified Technology Specialist (MCTS): Windows Server 2008 (2012) Network Infrastructure, Configuring
- Microsoft Certified Technology Specialist (MCTS): Windows 7 (10) and Office 2010 (2016), Deploying
- Microsoft Certified IT Professional (MCITP): Enterprise Administrator
- Microsoft Certified IT Professional (MCITP): Enterprise Desktop Support Technician 7

Experience in the following:

- Microsoft Access development
- Microsoft Office 365 administration
- Web development in Microsoft technologies such as VB.NET or C#.NET, and Microsoft SQLServer
- Management of user accounts with Dell ActiveRoles

- d) Respondents shall submit the resumes of the individuals who will actively participate in this project and who have the certifications and experience as stated in **Section II.3.c (Additional Requirements)**.
- e) Issues that are not resolved remotely shall be assisted onsite within one hour of request.
- f) These requirements should be accomplished utilizing firm-fixed pricing and should not deviate unless device count is adjusted +/- 10%.

E) EXCEPTIONS

List, and fully explain, all exceptions taken to any term or condition of this RFP.

YOUR ORGANIZATION HERE

By: _____

Organization Requesting for Proposal

Date: _____