

# REQUEST FOR PROPOSAL

*Information Technology*

## REQUEST FOR PROPOSAL

**COMMUNITY RELATIONS – SOCIAL DEVELOPMENT COMMISSION  
RFP #04-1224  
ITMSP Bids for CR-SDC**

**Issued  
April 12th, 2024**

**Proposal must be received no later than  
May 1st, 2024**



**Social Development Commission**  
*Pathways from poverty to success*

Community Relations – Social Development Commission  
1730 W. North Avenue Milwaukee, WI 53205

## General Information

The Community Relations-Social Development Commission (CR-SDC) of Milwaukee is seeking proposals for an ITM Service Provider. The selected vendor will work with the CR-SDC IT Manager and staff to support agency IT operations, maintenance, and planning efforts—ensuring sustainability and growth of CR-SDC’s technological capabilities.

As the technological prowess and stability of an organization is vital to its successful operations, the agency is deeply committed to maintaining, upgrading, and partnering with noteworthy vendors to ensure the integrity and durability of our technological network. As the largest anti-poverty agency in Wisconsin, we are mandated to serve Milwaukee County residents, while impacting city and state anti-poverty efforts.

The intent of this RFP is secure an IT Managed Service Provider (ITMSP) vendor that will provide IT Infrastructure Management Services, Enterprise Service Desk Management, Security Threat Detection Management & Response Services, Office 365 Management Services, Management of Co-Located File Server, and other requested services. The successful ITMSP vendor will enter into a professional services master service agreement contract with SDC to provide services as outlined herein.

Proposals will be accepted until **1:00 pm on May 1st, 2024**. Submittals relative to this Request for Proposal should be addressed to:

Scott Scherer- Purchasing Division  
9004 W. Lincoln Ave.  
West Allis, WI 53227

IT Managed Service Provider (ITMSP)  
RFP# 04-1224 should be marked on the envelope.

**Written responses and all supporting materials must be submitted in one original plus seven (7) copies.**

## SCOPE OF SERVICES

The Community Relations-Social Development Commission (CR-SDC) is seeking to secure the services of a skilled, experienced, credible, and credentialed IT Managed Service Provider (ITMSP) preferably located within Milwaukee and Suburbs of Milwaukee to perform the following activities:

- IT Infrastructure Maintenance Service
- IT Infrastructure Monitoring Service
- IT Infrastructure Tuning Service
- Data backup & Recovery Service
- Onsite End User Support and Services
- Endpoint Protection Service
- Security information and event management Service
- Automated Vulnerability Scanning & Reporting Service
- Email Protection Service
- Microsoft 365 management services
- Co-Located Cloud Hosted File Server Management Services
- Direct and ongoing communication with IT Manager and IT Staff.

## General Requirements of Proposal Content

**Proposals should address the areas listed below. Respondents may supplement proposal narratives with additional material (such as brochures, promotional materials, letters of recommendation, sample materials, etc.).**

1. Please describe your experience with the following:
  - a. As an IT Managed Service Provider (ITMSP)
  - b. Managing customer centric experiences, related to help desk and troubleshooting
  - c. Advancing organizational IT capabilities and staff comprehension
  - d. Prioritization of client emergency infrastructure needs
  - e. Staffing and retaining large teams of Support Engineers
2. Please describe what you believe distinguishes your IT Managed Service Provider (ITMSP) firm from other vendors?
3. Cost and basis for cost – Please list the itemized and the total cost for the services you describe in your proposal. Provide the basis for your cost estimate (such as cost per hour of facilitation, cost per actual time spent on all activities, a flat fee, or other basis). Be sure to account for any expenses, such as transition support cost from the Incumbent Vendor or mileage, if expenses are not included in your proposed fee. The cost basis may be used in negotiating the final contract amount with the successful proposer, so proposers are encouraged to provide as much detail as possible for their cost estimates.

**The firm or individual responding to this RFP must provide the following:**

1. Cover letter on firm letterhead indicating the name and title of the person(s) who are authorized to answer questions about the RFP response. The cover letter should be limited to one page in length and summarize the key elements of the proposal.
2. Statement of Qualification: This section must not exceed two (2) type written pages and should include relevant details about your educational background, experience, and applicable skill sets.
3. Evidence of substantial knowledge and experience in purveying IT Managed Service Provider (ITMSP) services for a mid-size agency. Please provide evidence of your past success in similar work.
4. At least three (3) professional letters of reference/recommendation. The references should include Organization Name, Contact Person, Title, Address, Phone, and E-mail address.

**I. ELIGIBILITY REQUIREMENTS**

The Contract award will be made after successful negotiation of a final agreement with the respondent whose proposal is selected from all respondents with the implementation of services to follow. This RFP, however, does not indicate a commitment by the CR- SDC to award a contract to any successful respondent. The CR-SDC reserves the right to reject any and all proposals without cause and to end negotiations without cause. A selection is estimated to occur within approximately two days after receipt of proposals. The CR-SDC intends to evaluate the proposed services based upon the data presented in response to the RFP. The proposals will then be reviewed based on qualifications, specific experience, references, familiarity with the services, and compensation; and then will be rated according to which firm best meets the needs of the CR-SDC.

Applicants whose existing contracts with CR-SDC are not in good standing will **not** be considered for a contract. Agencies not eligible include those that have had a CR-SDC contract terminated for default; are currently debarred and/or have been issued a final determination by a City, State or Federal agency for performance of a criminal act, abridgement of human rights or illegal/fraudulent practices.

Those firms whose proposals most closely satisfy the needs and requirements of the CR-SDC may be required to attend an interview and discussion meeting with the CR-SDC staff on a date to be determined. Failure to attend this meeting, if selected, may give cause to have your proposal declared non-responsive and rejected, at the CR-SDC's discretion.

## **II. CONTRACT AWARD**

Under this Formal RFP, the contract period is estimated to begin upon execution of the signed agreement. The RFP will be reviewed by the CR-SDC on an individual basis. The CR-SDC reserves the right to terminate the contract at any time should the vendor not meet service and performance expectations.

## **III. CONTRACT SPECIFICATIONS**

A complete response to this Request for Proposal (RFP) must include answers and completion of all of the above and any attached questions and statements. Any CR-SDC signature to accept this proposal or enter into a relationship agreement will be subject to review by CR-SDC Legal Services. The appropriate and authorized CR-SDC signer(s) will not sign any documents until all CR-SDC potential legal reviews and concerns with the pending documents are resolved in writing

A contract will be issued to the successful bidder. The selected provider will be expected to meet performance objectives as determined by CR-SDC. Failure to perform can result in termination of the contract. CR-SDC will consider all of the following factors listed below, as well as the completeness and timeliness of responses addressed in the RFP in the evaluation of all proposals. Please include all of this requested information in your RFP response.

### **Additional Information**

**Letter of Intent** (Deadline: April 22nd, 2024, 1:00p.m. CT)

To assist in the evaluation of potential Strategic Planning Services, please provide the following information:

#### **Firm**

1. Firm name, address, and contact information including telephone number, fax number, and website address.
2. Names and titles of all principals of the firm (name, title, phone number).
3. Type of firm: individual, partnership, corporation, subsidiary, or government entity; and whether in good standing at the time of submitting the proposal.
4. Organizational structure of the firm, history, including number of years in existence, number and location of offices, and total number of employees.
5. Provide details of your firm's financial status and stability.
6. Discuss any impending changes in your firm that could impact the delivery of services.

7. What characteristics most distinguish your firm from your competitors? Summarize the benefits to our organization of engaging your firm.

**Other**

1. Are there any conflicts of interest between your firm and the Community Relations-Social Development Commission (CR-SDC)? If “yes” please elaborate.
2. Has your firm or anyone that will be working with the CR-SDC ever been cited by a professional or regulatory governing body for disciplinary reasons? If “yes” please elaborate.

**Please review the following important information prior to submission:**

- **Non-discrimination:** Any agency or organization providing services for CR-SDC agrees not to discriminate against any employee, client, or applicant for employment or services on the basis of age, race, religion, color, disability, physical condition, sex, national origin or ancestry, arrest or unrelated conviction record, sexual orientation, military/veteran status, or military participation. This provision shall include, but not be limited to all employment situations and selection for services.

- **Insurance Requirements**

General Liability:	\$1,000,000.00/ Per Occurrence
	\$2,000,000.00/ Annual Aggregate
Personal Injury:	\$1,000,000.00/ Per Occurrence
Fire Legal Liability:	\$100,000.00/ Per Occurrence
Products Completed Operations:	\$1,000,000.00/ Per Occurrence
Medical Payments:	\$5,000.00/ Per Occurrence
Owned Auto Liability and or -	\$1,000,000.00
Non-Owned/Hire Auto Liability -	If Automobiles Utilized
Workers Compensation:	Statutory Employers Liability
(\$500/\$500/\$500)	
Professional Liability:	\$1,000,000.00/Annual Aggregate Per Specialty

**Community Relations-Social Development Commission is to be named additional insured on all liability coverage, evidenced via a certificate of insurance.**

**IV. INSTRUCTIONS**

**Cover Sheet**

The enclosed Cover Sheet is the first page of the application. Use that form or replicate the form ensuring all information is provided. A signature is required to qualify the applicant for consideration.

**Minority Certification (If applicable)**

\* CR-SDC intends to use EBE/DBE'S (Small, Minority and Women) vendors whenever practical, in accordance with the agency's mission. CR-SDC will endeavor to bid to EBE/DBE's whenever and wherever possible. Bids can possibly be awarded to these vendors if they come within 5% of the lowest bidder and if the quality of the service or goods supplied is of at least equal quality compared to the other vendors. EBE/DBE's vendor must be certified to receive this 5% preference (the State of Wis., City of Milw.EBE. or Wis. Unified Certification Program). Certification documentation must be attached to all copies to qualify for points.

**V. IMPORTANT DATES**

Formal RFP Issued: Wednesday, April 12<sup>th</sup>, 2024.

Deadline for Letter of Intent: April 22, 2024

Deadline for Submitting Written Question: April 26<sup>th</sup>, 2024, 1:00p.m. CT.

Proposal Submission Due Date: May 1<sup>st</sup>, 2024 1:00p.m. CT

Estimated Start Date: June 2024

Proposals must be received no later than May 1<sup>st</sup>, 2024, 1:00p.m. CT. **Proposals will not be accepted via-email or fax.** Late proposals will not be accepted. Please do not include material other than that requested. Additional materials may be discarded.

**VI. FOR ADDITIONAL INFORMATION OR CLARIFICATION**

All correspondence regarding this RFP must be conducted through e-mail with a telephone confirmation of receipt of message, and must be received by 1:00 p.m. CT, April 26<sup>th</sup>, 2024, with RFP# referenced.

Contact for information or clarification:

**Scott Scherer, Purchasing Coordinator**  
**9004 W. Lincoln Ave.**  
**West Allis, WI 53227**  
**(414) 906-3911**  
*sscherer@cr-sdc.org*

If any updates to this RFP become available, interested parties will be notified by email.

**VII. BASIS FOR AWARD OF CONTRACT(S)**

A decision will be rendered by staff and management from the SDC. Decision factors will include, but are not limited to, budget, and ability to communicate appropriately with the Facilities Manager. Proposals will be judged on completeness of response and be numerically scored (see page nine (9) "Criteria Review") and qualitatively assessed. In the event that

proposals receive similar scores after the assessment process, potential vendors may be required to meet with SDC staff for a brief interview to clarify various points of interest. Incomplete proposals will not be reviewed. Certified minority-owned and women vendors are strongly encouraged to apply. All applicants will be notified of the final decision. As a result of this Request for Proposal (RFP), the effective date of any individual or aggregate award(s) is projected to be June 2024.

### **VIII. GRIEVANCE PROCEDURE**

Once a vendor has been selected pursuant to the agency's competitive proposals process, an unsuccessful applicant or bidder may raise any question, challenge, or appeal with respect to the selection process in the following manner:

1. Any complaint or challenge to the selection process must be communicated in writing to the CR-SDC Executive Department within three business days of the date that notice of selection/non-selection was received.
2. The CR-SDC Executive Office shall provide a written response to the complainant within five business days of receipt of the written complaint.
3. If after the review of the response described in step 2, above, the complainant remains unsatisfied with the process, the complainant may file a grievance with the Executive Committee of the Board of Commissioners. The grievance must be in writing, must clearly set forth the grounds or basis for the grievance, and must be filed within five business days after receipt of the response described in step 2, above. The Chairperson of the Executive Committee will review the grievance and may convene the Executive Committee to discuss the complaint. The Committee may consult with persons necessary to determine the following issues:
  - (a) Did the selection process violate any policy or procedure of the agency?
  - (b) Did the selection process violate any Federal, State, or local law?

The Chairperson shall communicate a written decision to the complainant within 30 calendar days of receiving the written grievance. The written decision of the Chairperson shall be final.

### **Criteria Review**



***STATEMENT OF QUALIFICATIONS:***

- 1) Firm Experience (15 points)***
- 2) Firm Expertise (15 points)***
- 3) Oral presentation of Firm's Experience & Expertise (10 Points)***
- 4) Rates (30 points)***
- 5) Special Services (20 points)***

***Maximum 90 Points***

**REFERENCES /MINORITY-OWNED VENDOR**

- 1) References - The applicant has provided the names and contact information of five non-profit or government references where similar services have been rendered. (5 points)
- 2) Minority-Owned Vendor - The applicant is a certified minority-owned vendor. Certification documentation must be attached to the proposal to qualify for points. (5 points)

***Maximum 10 Points***

• PROPOSAL CHECKLIST •

**Cover Sheet with signature:** Original and seven (7) copies. The cover sheet should be the first page of the proposal.

**Statement of Qualifications:** Exhibit A - Original and seven (7) copies. Not to exceed two (2) typewritten pages, single-spaced, 10-point font or larger and 1-inch margins on all sides.

**Examples of strategic planning:** Provide at least two (2) examples of adopted Strategic Planning documents developed under your guidance from other organizations.

**Letter of Intent:** Information provided on page 6 and 7 of RFP.

**References:** Three (3) professional letters of reference/recommendation. References must include Organization Name, Contact Person, Title, Address, Phone, and E-mail address.

**Minority Vendor Certification** (if applicable): One (1) copy of certification documentation must be attached to the original in order to qualify for bonus points.

**Mailing Envelope:** All materials should be sealed in one (1) envelope. All responses must have Strategic Planning Services RFP# printed on the front of the envelope and must be physically received by 1:00 p.m. on **May 1st, (no faxes or emails will be accepted).**

**REQUEST FOR PROPOSAL #04-1224  
COMMUNITY RELATIONS – SOCIAL DEVELOPMENT COMMISSION  
ITMSP Bids for CR-SDC  
COVER SHEET**

**Organization Name:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Ext:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Street Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Website:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**Social Security or Federal ID Number:** \_\_\_\_\_

**Total Proposed Budget if applicable:** \_\_\_\_\_

**Certified Minority Vendor\*** YES \_\_\_\_\_ NO \_\_\_\_\_      **Certified EBE** YES \_\_\_ NO \_\_\_

**Certified Woman Vendor\*** YES \_\_\_\_\_ NO \_\_\_\_\_      **Certified DBE** YES \_\_\_ NO \_\_\_

**Certification documents attached** YES \_\_\_ NO \_\_\_\_\_

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**Certification documentation must be attached to proposal to qualify for points.**

**Statement of Certification**

The proposed activities, qualifications, dates, availability of resources, staff, cost, and all statements made are true and correct.

**Authorization Name/Title:** \_\_\_\_\_ (Print)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Signature)

**Debarment and Suspension**

Signature below acknowledges vendor identified on application has not been suspended, debarred, declared ineligible, or voluntarily excluded from eligibility by any Federal department or agency.

**Vendor's Authorized Representative Signature and Title**

\_\_\_\_\_

Addendum 1.  
SDC IT Infrastructure Inventory

1.

On-premise IT Hardware at SDC location 1730 West North Avenue, Milwaukee, WI 53205.

PART #	DESCRIPTION	Qty
<b>SERVER</b>		
P19766-B21	HPE DL360R10 8SFF NC CTO CHASSIS	1
P02492-L21	HPE 4210 2.2GHz 85W 10C PROC KIT DL380G1	1
P02492-B21	HPE 4210 2.2GHz 85W 10C PROC KIT DL380G1	1
P00922-B21	HPE 16GB 2RX8 DDR4-2933 REG MEM KIT G10	4
804331-B21	HPE SA P408i-A SR 12G 2GB SAS CNTRLR	1
P01366-B21	HPE 96W SMART STORAGE BATTERY 145MM KIT	1
P04556-B21	HPE 240GB SATA 6G RI SFF SC DS SSD	2
872479-B21	HPE 1.2TB 10K SAS 12G SFF SC DS HD	4
874543-B21	HPE 1U SFF EASY INSTALL RAIL KIT G10	1
865408-B21	HPE 500W FLEX SLOT PLAT HS PSU	2
AF556A	HPE 1.83M PWR CORD 110V C13-5-15 10A	2
BD505A	HPE ILO ADV W/ 3YR 24X7 TS SVR LTU	1
HS7U6PE	HPE 2-YEAR POST WARRANTY TECH CARE ESSEN	1

2.

- ESXi Host Server
- Six Virtual Servers
- Microsoft Windows Server 2022

3.

Vendor Hosted & Managed IT Hardware listed below. HIPAA/Soc2 certified environment. The hosting of the data is getting charged currently by capacity usage.

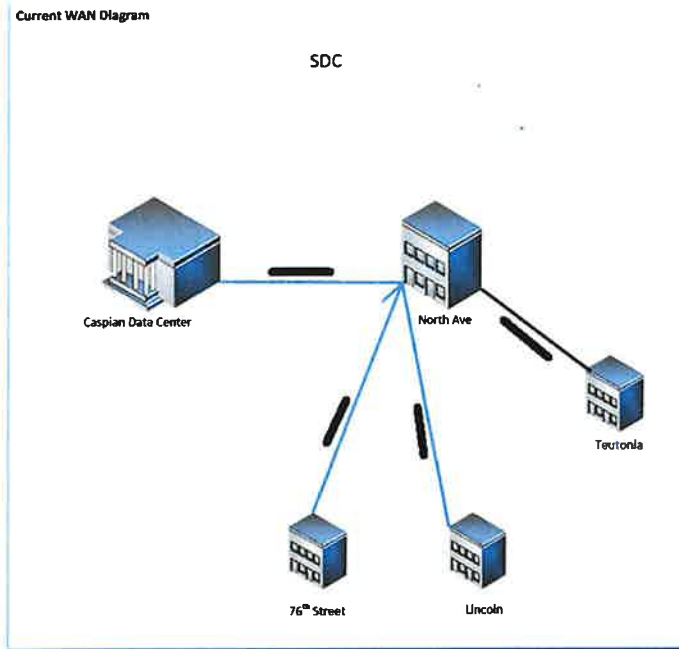
**Infrastructure As A Service**

<b>Base Server Build Includes:</b>		
2 CPUs		
4 GB RAM		
100 GB Disk		
<b>TERM: 18 Months</b>		
Name		
[REDACTED]		
[REDACTED] Local)		
<b>TOTALS</b>		

CPU ADD	RAM ADD	Storage ADD
2	12	3500
2	4	20
0	0	0
0	0	0
4.00	16.00	3,520.00

4.

## SDC Network Topology



5.

Additional Network Hardware:

- Wireless Access Points
- Aruba Switches
- Cisco Meraki Switches
- Network-attached storage (NAS)

6.

Desktops / Laptops

- 394 Managed End Points

7.  
Office 365 based Cloud Services:

Name	Available licenses	Assigned licenses	Account type
Microsoft 365 Business Premium	1	0/1	Organization
Microsoft 365 Business Standard	43	0/26/269	Organization
Microsoft Fabric (Free)	999998	0	Organization
Microsoft Power Automate Free	9896	0/10/10000	Organization
Nonprofit Portal	25	0/25	Organization
Visio Plan 2	1	0/1	Organization