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## *Request for Proposal*

### *Outsourced IT & Managed Services*

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ISSUED DATE:

August 27, 2021

RFP Coordinator:

Sheryl Bowman

CNY Works, Inc.  
960 James Street  
Syracuse, New York 13203

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## **1 Request for Proposal (RFP)**

CNY Works, Inc. invites you to respond to this Request for Proposal (RFP). The focus of the RFP is to select a single organization to provide IT managed services to CNY Works, Inc. over a 1-year period, beginning on October 1, 2021, and ending no later than September 30, 2022. This RFP is issued for a one-year period, with an option to renew, at the OCWDB's discretion, for a maximum of four *additional* years (in increments of one year or more, as the OCWDB shall determine), without rebid.

Bidders are required to submit written proposals that present the bidder's qualifications and understanding of the work to be performed. The bidder's proposal should be prepared simply and economically and should provide all the information it considers pertinent to its qualifications for the specifications listed herein. Emphasis should be placed on completeness of services offered and clarity of content.

## **2 Response Delivery Instructions**

The proposal must be received by CNY Works in hardcopy at the address listed below, or electronically, no later than 4:00PM on Friday September 17, 2021.

CNY Works, Inc.  
Re: Proposal for Outsourced IT & Managed Services  
Attn: Sheryl Bowman  
Special Projects Manager  
960 James Street, Syracuse, NY 13203  
[SBowman@cnyworks.com](mailto:SBowman@cnyworks.com)  
(315) 477-6960

## **3 Term and Renewal**

The term of the Contract shall be for a one (1) year period with a four (4) year renewal option, unless earlier terminated. The Contract may be terminated by either party with a thirty (30) day written notice.

## **4 Introduction to Company**

CNY Works, Inc. is a not for profit (501(c)(3)) corporation and serves as the Onondaga County Workforce Development Board. CNY Works, Inc. has been designated by local government (City of Syracuse and Onondaga County) to administer the workforce development funds targeted for the Central New York area. CNY Works, Inc. functions as the apolitical convener of business, economic development, and community agendas to define workforce system goals, garner resources and support growth and development of the local and regional economy.

## **5 Overview of Current Company Technical Environment**

- A. On Premise network
  - 1. FortiGate firewall
  - 2. Cisco SG switch
  - 3. Physical wiring
- B. Servers
  - 1. Dell PowerEdge rack servers running windows server 2012 R2
  - 2. Hyper-V virtualization environment
    - (2) Physical Hyper-V servers

3. Virtual servers running server 2012 R2 and newer
  - (2) Domain Controllers
  - (1) File Server using DFS
  - (1) Terminal Server
  - (1) Phone VOIP Management Server
  - (1) App Server
  - (1) SQL Server
  - (1) Veeam Backup and Recovery Server
- C. Printers
  1. Copiers and printers managed via printer server
- D. Voice
  1. NEC VOIP phone PBX, Phones, and management server
    - Managed by CNY Business Solutions
- E. Workstations/Laptops
  1. (75) workstations and laptops running Windows 10 Pro 64-bit
- F. Applications
  1. Alpha Card Pro 550
  2. TruVision Navigator Security Cameras
  3. Apple MDM
  4. Adobe Enterprise
  5. Zoom
  6. Metrix
  7. Clean Slate
  8. MIP Accounting Software
  9. Paychex Flex
- G. Cloud hosted services
  1. Microsoft 365 Hosted Exchange and Apps
  2. Google Docs
  3. Veeam Backup and Replication Cloud Repository
- H. Remote Access
  1. Secure SSL VPN provided by FortiGate Firewall

## 6 Value Added Service Requirements

As part of this RFP, the following services are the current priority items for CNY Works, Inc.:

- **Local and Remote backup** – Executing a nightly backup plan for the critical servers, including a regularly-tested recovery process.
- **Technology strategy planning** – Working with current leadership staff to develop a long-term strategic technology plan focused on business need. The plan will take advantage of new and existing technologies to produce a pragmatic and effective future roadmap that enables the organization to fulfill its overall mandate in the community. The plan should also include a comprehensive security strategy to align with the Top 20 Critical Controls and the NYS Shield Act.
- **IT Solution design** – Work with CNY Works, Inc. staff to understand current and future Solution needs. This includes understanding of the enterprise architecture and recommending the most suitable solution for CNY Works, Inc. This may include recommendations and assistance with hardware, software, licensing, security, data migration, and overall expertise in this area.
- **Network Security** – Responsible for the hardening of all network and user devices. Monitor the network and corporate data for potential security breaches. Keep all security tools updated. Communicate to the CNY Works staff in the event there is any potential security issue. Staff training and proactive solutions to guard against phishing and other network penetration.
- **Chief Information Security Officer** - CISO

- **Systems monitoring** – 24/7 monitoring of CNY Works, Inc.’s IT assets which include, but are not limited to, email, servers, PCs, and network activity. Ensure proactive communication and escalation protocols based on the severity of any unscheduled outages.
- **Procurement management** – Selection of commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.
- **Warranty, break fixes and installation** – Planned and on-call services, including emergency response to server issues.
- **Office 365 management** – Manage Office 365 environment including security hardening.
- **User onboarding, modifications, and changes** – Create, update and disable users as requested.
- **System and application updates and patching** – Ensure that all systems including servers, workstations and network devices are properly kept current on security patches, application updates, and firmware revisions.
- **Technical support (ticket assignment)** – Ability to support CNY Works, Inc. inquiries as required, via help desk, including support for remote users.
- **Monthly/Quarterly Reporting and Communication** – Ensuring monthly/quarterly reporting on all purchases, assets, current activities and issues, and project status reports.
- **IT policy review and development** – Development of customized policies related to the use of technology and security.
- **Firewall/Switch management** – Manage the configuration, updates, security, network structure, and VPN user access.
- **PC deployment** – Delivery and setup of machines on-site.
- **Life cycle management of hardware units** – Process for end-of-life notification, replacement, and asset decommissioning and secure disposal.
- **Software licensing control** – Oversight of automatic renewal of software applications and maintenance of appropriate documentation.
- **Inventory of hardware** – Maintain an inventory of standard stock units on behalf of CNY Works, Inc.
- **Staff training and testing** – Coordinate and provide staff training on cyber security issues including deployment of required online training and sending fake phishing emails to staff to monitor potential liability.
- **Active Directory management** – User onboarding, changes, and termination management. Configuration and management of group policy. Ongoing security hardening.
- **Laptop encryption management** – Ensure all storage devices, mobile or otherwise, are properly encrypted.

## 7 Selection Criteria

CNY Works, Inc. will use multiple criteria to select the most appropriate partner. Respondents are encouraged to be as aggressive and creative as possible in their proposals. The following list summarizes the major qualitative areas that will be evaluated, along with the thoroughness of the RFP response.

- Industry expertise and experience in both infrastructure and security management
- Demonstrated customer service quality and support
- Previous relevant experience
- Vendor strength and stability
- Account management
- Reporting capabilities
- Cost Structure
- References

## 8 Response Contents and Format

A completed proposal must contain the following:

1. Complete Cover Page (A). The cover page must be completed and signed by an individual authorized to bind the contractor. All proposals submitted without such cover page may be deemed nonresponsive. Included must be a copy of contractor's Liability Insurance Certificate.
2. Complete Worker's Compensation Certification (B). Included must be a copy of contractor's Worker's Compensation Certificate.
3. Complete Independent Contractor Statement (C).
4. Complete Reference Form (D).
5. Complete RFP Information Requirements (9).

Please complete all sections of the RFP. Your response to this RFP will serve as the basis for the consideration of your potential as a partner. In signing the Cover Page, you formally notify CNY Works that you will comply with all pertinent requirements included in the RFP.

Proposals must be received in hardcopy or electronically by CNY Works no later than 4:00PM on Friday, September 17, 2021. Proposal prices are to be firm for ninety (90) days. All proposals become the property of CNY Works.

CNY Works' management will review all proposals, determine which proposal best fulfills the specifications outlined herein, and select the most qualified proposal. It is the intent of CNY Works to accept the proposal that best fulfills the specifications outlined in this RFP regarding price, quality of service, contractor's qualifications and capacity to provide the specified service, and other factors which CNY Works may consider. CNY Works reserves the right to accept or reject any or all proposals and to waive irregularities therein. After a proposal has been selected, CNY Works' management will notify each bidder as to the status of its proposal.

Specific payment terms will be negotiated with the successful company during the contracting process. However, the company's invoice must include date service was performed and amount due for service. Special services provided by company will be billed via a separate invoice that includes service description and date service was provided.

## **9 RFP Information Requirements**

For the purposes of understanding more about your company and your ability to successfully fulfill CNY Works, Inc.'s Information Technology needs, please provide the information below, clearly referencing each question or section.

### **9.1 Corporate Information**

1. Give a brief overview of your organization's involvement in providing IT value added services in the marketplace.
  - a. Highlight any experience in the nonprofit and/or Workforce Development sectors.
2. How long has your organization been in this business and what is your current market share?
3. Provide your organization's annual revenue.
4. In what cities do you maintain offices?
5. Indicate the number of employees in your organization.
  - a. How many of those are dedicated to account management and/or technical support?
6. Describe your level of security expertise.
  - a. How many individuals on staff focus on security? Provide their associated certifications.
  - b. Do you have firsthand experience with a security/data breach?
7. How many staff are full-time vs. contract?
8. Please describe your relationships and experience with manufacturers and major distribution partners in the technology marketplace.
9. What differentiates your organization from your competitors in the marketplace and how will this be relevant to us?
10. Will you subcontract any components of the proposed solution to third party organizations?

- a. Please describe the components to be subcontracted.
  - b. Please provide details of any agreement in place with the subcontracted firm/individuals.
  - c. Please provide a summary of past work that you have successfully completed together.
11. Please provide details of three (3) current customer accounts that are similar in scope and requirements to those of CNY Works, Inc. that may serve as references.

## **9.2 Proposed Approach and Solution**

- 9.2.1 Please provide a proposed work plan for a migration to your organization as a CNY Works, Inc. preferred vendor. Specifically, provide the following information:
- i. Key activities
  - ii. Timing
  - iii. Information/resource requirements from CNY Works, Inc.
  - iv. Deliverables
  - v. Key milestones, checkpoints, and other decision points
  - vi. Remote vs. on-site support provided
- 9.2.2 If we elect to move forward with your organization, what CNY Works, Inc. resources would you require (e.g., information, data, staff resources, communication) during the course of migration and on an ongoing basis?
- 9.2.3 What information will be needed from our existing IT vendor?
- 9.2.4 Please identify the team that will be assigned to the account and describe how you plan to interact with us and any third-party providers that may provide services to CNY Works, Inc.
- 9.2.5 Please describe your experience in the value-added services listed in Section 4, Value Added Service Requirements.

## **9.3 Support**

- 9.3.1 Describe your technical support options including:
- 9.3.1.1 The assistance request process.
  - 9.3.1.2 The escalation process.
  - 9.3.1.3 The support hours.
  - 9.3.1.4 The response times.
  - 9.3.1.5 The staffing levels.
  - 9.3.1.6 The staff expertise.
  - 9.3.1.7 On-Site support process.
  - 9.3.1.8 The physical location of the help desk, including a sample of your service level agreement.
- 9.3.2 Please provide details and a sample of your standard reporting capabilities.
- 9.3.3 Describe any documentation and support (e.g., user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.
- 9.3.4 What options are available for user training and technical training that may be required by our staff?
- 9.3.5 Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.
  - 9.3.6 How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?

## **9.4 Financials**

- 9.4.1 Describe the pricing model(s) that you typically employ for your standard services.
- 9.4.2 Please describe charges associated with each of the items listed in Section 4, Value Added Services, and whether they are included in a standard per-unit cost vs. charged on an ad hoc basis.
- 9.4.3 Do you offer service bundles and if so, describe the effect of this bundling on pricing.
- 9.4.4 How are projects planned, priority assessed, and hourly costs determined?

## **10 Insurance Requirements**

CNY Works, along with its officers, directors, agents and employees, shall be named as additional insureds for Ongoing Operations and Products/Completed Operations (completed operations) on the Company's Commercial General Liability Policy, Commercial Automobile Policy and Excess or Umbrella Policy, which must be primary and noncontributory with respect to these additional insureds.

Minimum Insurance Limits are:

### **Commercial General Liability Insurance**

\$1,000,000 Each Occurrence Limit (Bodily Injury and Property Damage)

\$2,000,000 General Aggregate per Project

\$2,000,000 Products & Completed Operations Aggregate

\$1,000,000 Personal and Advertising Injury Limit

### **Business or Commercial Automobile Liability Insurance**

\$1,000,000 combined single limit per accident

**Excess or Umbrella Liability** (to overlay Company's Liability, Automobile Liability and Commercial General Liability coverages)

\$1,000,000 Occurrence/aggregate

Prior to commencement of an Agreement, and thereafter from time to time upon request of CNY Works, Company shall submit a Certificate of Insurance as required evidencing the coverages and other requirements as set forth above. The Company's insurance policies shall provide for thirty (30) days' written notice to CNY Works of any cancellation or any change in coverage and be evidenced by a Certificate of Insurance. Copies of insurance policies shall promptly be made available to CNY Works upon request.

## **11 Communications and Response**

Sheryl Bowman at CNY Works, Inc. is the designated Company representative for this initiative. For any information relative to this RFP, please direct all inquiries to her contact information as follows: [HR@cnyworks.com](mailto:HR@cnyworks.com)

## **12 Notification of Intent to Respond and Clarification Questions**

Please indicate your intention to respond, by email, to the above email address by the *Intent to Respond and Questions Due* date outlined in the *Key Dates* table below. In addition, please provide the contact details of the individual responsible for coordinating your RFP response. At the same time, we ask that you submit any clarification questions regarding the RFP. Answers will be provided to all respondents by the *Answers Provided* date.

## **13 Vendor Presentations**

CNY Works, Inc. may request the final three (3) candidates to present to the RFP committee.



## **14 Key Dates**

<b>Event</b>	<b>RFP Issued</b>	<b>Intent to Respond and Questions Due</b>	<b>Answers Provided</b>	<b>Proposals Due</b>	<b>Presentations if Requested</b>
<b>Date</b>	August 27, 2021	September 3, 2021	September 10, 2021	September 17, 2021	September 22, 2021

## **15 No Obligation**

The submission of a proposal shall not in any manner oblige CNY Works, Inc. to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.

## **16 Agreement of Non-Disclosure**

This document is considered to be proprietary and shall not be disclosed to any other party. It is designed, developed and submitted to potential partners of CNY Works, Inc. solely for the benefit of CNY Works, Inc.

## **17 No Guarantee**

CNY Works, Inc. makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.

**Attachment A**

**Cover Page**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_

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

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Tax ID #: \_\_\_\_\_

Liability Insurance Limits: Per Occurrence: \_\_\_\_\_ In Aggregate: \_\_\_\_\_

Proposed Monthly Cost for IT Managed Services (Attach detail): \_\_\_\_\_

\_\_\_\_\_  
Signature of Company Representative

\_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Date

**Attachment B**

**Worker's Compensation Certification**

I hereby certify that effective the date of my Contract with CNY Works and at all times in the performance of such Contract that:

- I have and will maintain in full force and effect policy of Workers Compensation Insurance in compliance with the Laws of the State of New York with the following insurance company:

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Company Name

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Agent's Name, Address and Telephone Number

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Policy Number and Effective Date - **ATTACH COPY OF CERTIFICATE**

**OR**

- I will perform said Contract myself and do not have and will not have any employee or employees assisting me with the performance of the Contract and am not required by the Laws of the State of New York to obtain and maintain a policy of Worker's Compensation Insurance in the performance of this Contract.

I understand that this statement is made as a material part of the Contract, which I have contemporaneously made with CNY Works.

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Signature of Company Representative

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Printed Name and Title

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Date

**Attachment C**

**Independent Contractor Statement**

It is agreed that nothing herein contained is intended or should be construed in any manner as creating or establishing the relationship of co-partners between the parties hereto or as constituting the Contractor as the agent, representative or employee of CNY Works for any purpose or in any manner whatsoever. The Contractor is to be and shall remain an independent contractor with respect to all services performed under this Agreement.

The Contractor represents that it has, or will secure at its own expense, all personnel required in performing services under this Agreement. Any and all personnel of the Contractor or other persons, while engaged in the performance of any work or services required under the Agreement, shall have no contractual relationship with CNY Works, shall not be considered employees of CNY Works and any and all claims that may or might arise under the Unemployment Compensation Act or the Workers' Compensation Act of the State of New York on behalf of said personnel arising out of employment or alleged employment including, without limitations, claims of discrimination against the Contractor, its officers, agents, contractors or employees, shall in no way be the responsibility of CNY Works; and the Contractor shall defend, indemnify and hold CNY Works, its officers, agents and employees harmless from any and all such claims irrespective of any pertinent tribunal, agency, board, commission or court. Such personnel or other persons shall neither require nor be entitled to any compensation, rights or benefits of any kind whatsoever from CNY Works, including without limitation, tenure rights, medical and hospital care, sick and vacation leave, Workers' Compensation, Unemployment Insurance, disability, severance pay and retirement benefits.

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Contractor/Individual Signature:

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Printed Name and Title:

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Date: