



2023-2024 REQUEST FOR PROPOSALS (RFP) IT MANAGED SERVICES PROVIDER

PURPOSE

The purpose of this Request for Proposals (RFP) is to invite prospective vendors to submit a proposal to supply a Managed IT Service Provider (MSP) to Louisiana Public Health Institute (LPHI). The RFP provides vendors with the relevant organizational, operational, performance, system, and architectural requirements of services to be managed, as well as an opportunity to respond to criteria that LPHI considers significant in the process to award this contract.

WHO IS ELIGIBLE TO RESPOND?

LPHI is seeking an MSP to serve the company's non-intellectual property IT needs, including but not limited to maintaining computer infrastructure & hardware, responding to helpdesk requests, and being a strategic partner for future growth, security, and resiliency. The MSP will provide services complementary to a small internal IT team. The vendor will report directly to LPHI's IT Director under the supervision of the CEO, and MSP staff will work in coordination with LPHI's System Administrator, Associate Director of Informatics, HIE Principal Engineer, and other staff as necessary to support LPHI operations.

Managed Service Providers who have proven record of high-quality service delivery and support are eligible to respond. LPHI is open to reviewing proposals from a consortium of vendors provided that contracting, management, and billing are centralized.

ABOUT THE ORGANIZATION

The [Louisiana Public Health Institute](#) is a statewide, non-profit organization that has been promoting the health and wellbeing of Louisianans since 1997. LPHI is made up of approximately 100 employees based throughout the state in all nine Louisiana Department of Health regions. We accomplish our goals alongside our over 500 partner organizations at the local, state, and national levels, which include community-based organizations, foundations, healthcare systems, academic institutions, government agencies, and a cadre of additional stakeholders. Our impact is felt across Louisiana as we leverage our expertise and skills in all areas of public health, from advocacy to data and research infrastructure to communications, to ensure that everyone has fair and just opportunities to be healthy and well.

As a grant-funded organization, LPHI typically has over 30 individual programs with varying needs at any given time. Among these numerous and evolving programs, LPHI operates three primary services which require the most ongoing technical support. These programs are (1) The Greater New Orleans Health Information Exchange, (2) Research Action for Health Network, and (3) the Louisiana Campaign for Tobacco Free Living. Each of these programs involves the transmission and storage of Protected Health Information (PHI) governed by Federal law including the Health Insurance Portability and Accountability Act (HIPAA). These three programs account for the majority of our infrastructural needs, which include big data processing, low latency notification services, and 24/7 availability. Supporting and maintaining compliance with HIPAA guidelines and regulations is a necessary strength for all applicants. More information on LPHI's focus areas can be found at lphi.org/work.

LPHI maintains a hybrid work model in which employees may choose to work from a central office space in New Orleans or remotely from another location. In addition to programmatic support, LPHI requires support for basic office systems at our New Orleans office (i.e., print services, phone systems, networking), financial and accounting systems, and our remote workforce.

LPHI's (FY21) annual operating budget is approximately \$17M.

SCOPE OF SERVICE

Service Management

1. SLA Management

- If you have an established SLA schedule, provide a copy of your SLA.
- Describe the process by which SLA is established, monitored, evaluated, and reviewed.
- For comparison purposes, what is the SLA, and describe the response for these items:
 - Password resets
 - Non-critical server problem
 - New employee setup (laptop, cube setup, monitors, docking station, keyboard, and mouse), and phone setup.
 - Critical server/network problem

2. Service Report

- Describe the types of service reports that are provided and how they are generated.
- Indicate the types of communication channels that are provided, such as onsite or online meetings.
- How are metrics used in your organization as tools to improve overall service?

3. Added Service / Equipment Process

- Indicate the process you use when added service and/or equipment is required.

4. Network Operations Center (NOC) Description

- Describe your NOC center organization as it would apply to this proposal.
 - Include the staffing numbers, hours, level of training, and experience that is typical of the first responders.
- Describe your ticket management process:
 - Describe how tickets are triaged, the levels of support provided, and the criteria for moving a ticket from one level to the next?
- What is the internal escalation process to Alert the next level when an issue is taking longer than expected (approaching or exceeding SLA when they exist)
- Describe your normal operating hours and available services.
- Describe your process for managing requests received during off-hours, including the triage process employed to know when to deal with issues, when needed, during off-hours.

Service Features

Describe how you would work with LPHI to deliver services and/or solutions.

1. Support Structure

- Provide a guide to the significant roles in the MSP relationship with LPHI; describe the team to be assigned, indicating roles for technical, account management, and executives, including escalation process.
- Describe how you would interact with LPHI at various levels and the frequency of these encounters, including cooperation with LPHI's on-site, internal IT team members.

2. Customer Support & Engagement Style

- Describe the various levels of direct end user customer service that you provide and the days of the week and times of day that each level is provided.
- Describe the preferred engagement structure with LPHI as it concerns Level 1 support of our end users. What method(s) do end users contact your customer support?
- Describe your capabilities to provide end-user software training for supported software. For example, how would you handle end-user support and training for an organization-wide deployment of Adobe Sign?

3. Services Support Multiple Vendors' Products

- Indicate whether your service supports all items described in *Existing Services Requirements* with corresponding services availability.
- Describe the process/factor by which the capability is provided.

4. Additive Services and Fees

- Indicate whether your organization has additional services not requested as part of the required services. If a fee schedule is available, please provide.
- Indicate fee schedule for additional requests or per diem charges for services required after expiration of the contract.

5. Onsite Support

- Describe your onsite incident response capabilities and process.
- Describe how and at what level personnel can be on-site to respond to local issues. Include how issues requiring local intervention are addressed.
- Describe if and how support for other equipment is managed, including printers, audio/visual devices (i.e., projectors and other conference room equipment), and on-prem server room heating, A/C, & UPS management.

Service Operations

1. Implementation and Configuration

- Describe the process by which services (as described in *Existing Services Requirements*) will be transitioned, including documentation, project management, roles and responsibilities, training/transition, installation and configuration of applications and data upload.
- Where management services will include solutions integrated to our on-premise solutions, describe the process by which the management solution is deployed. Include any tasks that must be performed on systems or devices already deployed (such as network configuration and third-party solution integration).

2. On-Going Operations

- Describe the process by which the initial configuration of your solution is updated and maintained. Include installations of patches, the update and/or modification of any rules, etc.
- Describe the process by which change requests are initiated, managed, and documented. Include request templates and process charts.
- Describe communication process for operational updates and quarterly or annual strategic discussions.

3. Auditing and Reporting

- Describe methods for alerting and reporting on system status and methods of reporting service level agreements. If a real-time view is available to monitor SLAs and availability, provide screenshots and describe the process by which the capability is provided.

Existing Services Requirements

The following is a list of the services and requirements requested through the RFP. Please identify any changes to the existing services required as part of a response. Appendix A contains a summary of existing infrastructure and factors that would impact engagement at LPHI.

1. Initial Inspection

- Describe the steps that you take during the Initial Inspection of our system and process, including timeline and any disruptions and probes.

2. Technology Vendor Negotiations

As the MSP for LPHI the vendor will also be the negotiator for related goods and services.

- Describe your policies and processes for these types of services, including vetting different product offerings and comparing pricing options.
- How does the vendor interact with LPHI to assure low cost and budgetary policies are being maintained?
- Describe what existing relationships you have that will benefit LPHI in the procurement of goods and services.

3. Network Infrastructure Support

- Describe the ticketing system and its processes and procedures.
- Describe your capabilities and experience supporting network switches, firewalls, and other infrastructure devices.
- Describe your experience and maintenance plans/services for Microsoft and Linux servers. Do you maintain staff that can support installation, upgrade, backup, and load balancing for Linux servers such as Ubuntu and CentOS?
- Describe your experience working with integrations in the Cloud (i.e., Azure, AWS).
- Describe your experience managing and securing web services, including VPN interface configuration with external partners.

4. Microsoft Experience

- Describe your company's competency in managing and supporting enterprises that use the Microsoft 365 Ecosystem.
- LPHI uses Microsoft 365 for its email platform.
 - Describe your experience using and supporting this platform.
 - Describe any backup strategy(s) that you have for this product.
 - Describe email archiving strategy(s) that you use/recommend.
 - Describe your experience and recommendations for e-mail encryption.
- Describe the level of experience that you have with the following Microsoft enterprise applications:
 - Microsoft SharePoint, OneDrive, Teams, etc.
 - Microsoft SQL Server (or other databases)
 - Microsoft Azure AD
 - Microsoft PowerBI

5. Other Enterprise Applications

Describe your knowledge and experience monitoring and supporting the use of these applications, if any:

- Multifactor Authentication, SSO, and User Identity verification
- VMWare
- Accounting platforms such as Microix, Abila, etc.
- Adobe Acrobat & Adobe Sign
- Statistical analysis software such as SAS and R

6. Provisioning Laptops and Servers

Describe your general strategy for the maintenance, provisioning, and retirement of employee laptops and corporate servers. Do you support and facilitate laptop leasing?

7. Employee On-boarding & Off-boarding

Describe your general strategy and support for automation of the on-boarding and off-boarding of LPHI employees and contractors.

8. Support Capabilities for Existing Software, Hardware, and Network Equipment.

Considering the list of items mentioned in Appendix A, hardware, and software, indicate all items that would be of concern to your taking on full support, as well as those that may be handled, but would take out of your normal area of expertise.

9. Site Monitoring and Alerting Systems

- Describe the capabilities of your real-time event and log monitoring and analysis.
- Describe your strategy/strategies for monitoring and alerting as relates to production, servers, and network infrastructure. Include a description of the key metrics being monitored and limits. Do you have a SOC?

10. Anti-Virus/Anti-Malware Management

- Describe your recommended Anti-Virus/Anti-Malware solution(s).
- How do you transition an organization that might have a different solution in place to your preferred system? What are the significant benefits of the solution you are proposing?
- Describe your capabilities and experience in preventing and remediating ransomware. Do you provide any ransomware insurance for your customers?

11. Business Continuity/Disaster Recovery (BC/DR)

LPHI has implemented some BC/DR, which may need to be reevaluated.

- Describe your recommended BC/DR solution.
- Describe how you would integrate with and compliment a wider enterprise-wide BC/DR policy broader than only IT functions. How would you interact with LPHI during a city-wide evacuation?

12. Local User File and Data Loss Prevention

Describe the recommended method to assure that end user files, email, etc. on their local laptops are unobtrusively protected from loss, both restoring lost user data and preventing data from being exposed while being HIPAA compliant.

13. Expected Changes

Identify any expected changes that will be required to be implemented if you are selected as the MSP.

VENDOR QUALIFICATIONS & REFERENCES

All vendors must provide the following information for their proposal to be considered:

1. Vendor Company Information

Provide a brief outline of the vendor company and services offered, including:

- Full legal name of the company and year established.
- Describe your ability to grow and scale with your customers.
- Describe your insurance coverage (provide certificates as appropriate)

2. Outline of Managed Security Services Supported, including:

- Any security certification reports that you have, such as SSAE 16 SOC 2, describing all the Trusted Service Principles that it covers, or equivalent.
- Do you adhere to a security framework such as NIST 800-171 or CMMC.
- Description of vendor's experience working within a regulated industry, such as healthcare, financial or other industry with compliance requirements.
- Indicate current insurance levels maintained by your organization and how this prevents LPHI confidential information from being exploited by internal or external foes.

3. Information on Current Managed Services Clients, including:

- Total number of current clients, distribution of client sizes and engagement level
- Where would LPHI fit in the distribution of companies that you service?
 - Number of clients with similar needs and managing the same security functions, and brief descriptions of those clients most like LPHI.
- How many years have you been servicing companies in our size range?
- Describe your experience working with clients in the non-profit space?
- Name and contact information for three (3) references from projects similar in industry, size, and scope, and a brief description of their implementation.

4. Employee Policies Information

- Describe the standard process by which you hire and screen your employees (i.e., background checks)
- If you provide training opportunities to your employees, please describe your program(s)
- Describe certifications and any certification processes that your staff maintains.
- What is your staffing level, and how has it been changing over last two years? Describe your process for replacing staff to maintain contracted level of services.
- Provide the average tenure of your service personnel at each level.

5. Diversity, Equity, and Inclusion (DEI)

- Describe and provide examples of your organization's commitment to diversity, equity, and inclusion (DEI). For example, staff trainings, philanthropy, organizational DEI statement, or prior/current/planned DEI-focused work.

BUDGET & ESTIMATED PRICING

All vendors must submit a cost breakdown for the implementation of their managed services for LPHI's project as described within this RFP. Costs should be identified as either capital or non-capital in nature. The vendor must agree to keep these prices valid for 180 days as of June 1, 2023.

It is expected that vendor will do a comprehensive inspection of the existing systems and processes to determine areas of concern, solidify maintenance requirements, and finalize pricing model(s). Provide the cost for this inspection phase, if any, and an estimate of the ongoing pricing based on the information provided in Appendix A. Pricing should be itemized for clarity and optional services clearly identified and priced.

As a non-profit agency, LPHI expects your most aggressive pricing.

EVALUATION CRITERIA:

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, economics, and enterprise. The purpose of this RFP is to identify those vendors that have the interest, capability, regulatory compliance competence, and financial strength to supply LPHI with MSP identified in herein.

LPHI will identify qualified vendors to be considered for the award on the following criteria:

- Capability of vendor to meet or exceed requirements set forth in the Scope of Services.
- Cost to LPHI, affordability of product(s), and support available from the vendor.
- Expressed interest in working with LPHI and ability of vendor to communicate its vision and capacity for establishing a relationship that addresses current and future needs, as well as industry trends.
- Financial stability of the vendor.
- Satisfactory responses to the information requested in this RFP.
- Satisfactory reference checks

After the RFP close date and during the initial evaluation period, LPHI will invite successfully submitted vendors to our facilities to make a sales presentation and to answer questions by the evaluation committee. LPHI may also elect to schedule an onsite visit to the vendor's primary site during this period.

PROPOSAL SUBMISSION AND EVALUATION

Instructions for Submission

1. Closing Submission Date: Proposals will be accepted on a rolling basis through **April 24, 2023**, end of day.
2. Inquiries concerning this RFP should be directed to Kyle Bradford at kbradford@lphi.org. Verbal communication shall not be effective unless formally confirmed in writing by the specified procurement official in charge of managing this RFP process. In no case shall verbal communication govern over written communication. Inquiries must be submitted in writing and be received prior to **April 17, 2023**, end of day.

Vendors shall bring to LPHI any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, vendors may recommend to LPHI any enhancements that might be in the best interests of LPHI. These recommendations must be submitted in writing and be received prior to **April 17, 2023**, end of day.

LPHI will make a good-faith effort to provide written responses to each question, request for clarification, discrepancies, or recommendations within three business days via e-mail.

3. Conditions of Proposal: All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by LPHI.
4. In responding to this RFP, the vendor fully accepts responsibility to understand the RFP in its entirety and in detail, including making any inquiries to LPHI as necessary to gain such understanding.

All information provided by LPHI in this RFP is offered in good faith. Individual terms are subject to change at any time. LPHI makes no certification that any item is without error. LPHI is not responsible or liable for any use of the information or for any claims asserted therefrom.

5. Submission Instructions:

All submissions must be sent electronically via e-mail to: RFQ@lphi.org. Electronic submissions cannot exceed 15 megabytes per email. Multiple emails per RFP submission can and will be accepted. An email acknowledgement of each submission received will be sent to the applicant.

Valid submissions must include the following items:

- Responses to all items listed within the Scope of Services
- Budget & Estimated Pricing
- Vendor Qualifications & References
- Completion of Appendix B: Vendor Certification
- Date of availability to commence services

Proposals will be reviewed on an ongoing basis. Any proposal may be disqualified if it deviates from the submission instructions in the RFP. Submissions will NOT be returned.

6. Reservation of Rights

LPHI reserves the right to add and/or delete elements, or to change any elements of the coverage and participation at any time without prior notification and without any liability or obligation of any kind or amount. LPHI reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. LPHI may, at its sole and absolute discretion, select no provider for these services if, in its determination, no applicant is sufficiently responsive to the need. LPHI reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. LPHI reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of LPHI. It does not commit LPHI to award any contract for services. LPHI reserves the right to disqualify any vendor who demonstrates less than such understanding. Further, LPHI reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of award if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to LPHI.

7. Confidentiality

If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.

8. Ineligibility

Under the following conditions, an individual or entity is ineligible to be a LPHI vendor, and therefore may not submit a proposal. LPHI employees and Board members, and their family members.

9. Disqualification

Any information withheld or omitted, or failure to disclose any history of deficiencies shall disqualify the applicant from award of the project and/or contract. LPHI reserves the right not to select an applicant for services described within this RFP if, in its determination, no qualified applicant has applied or is sufficiently responsive to the service need.

10. Notification of Selection and Timeline

LPHI will conduct a review on an ongoing basis of all submissions that meet the RFP guidelines. Additional information may be requested from the selected applicants.

Vendors determined by LPHI to possess the capacity to compete for this contract will be selected to move into the negotiation phase of this process. Written notification will be sent to all vendors via e-mail notifying them if they will move forward to the negotiation phase.

Depending upon applicants and skill areas, LPHI may elect to issue a new RFP to attempt to address any unmet needs.

TIMELINE

The following is a tentative schedule that will apply to this RFP, but may change in accordance with the organization's needs or unforeseen circumstances:

Release of RFP	April 10, 2023
Technical Questions/Inquiries Due	April 17, 2023
RFP Closes	April 24, 2023
Complete Initial Evaluation	May 5, 2023
Final Award Notification	May 26, 2023
30-day Transition of Services Begins	June 1, 2023
Commencement of Services	July 1, 2023
Contract Definition and Acceptance	TBD

Appendix A: Description of Systems

The list below is a guide to the current level of usage of IT Systems at LPHI. As in any active working environment, the data is subject to change without notice, but for the purpose of this RFP, it can be used as the benchmark.

- 1) **Number of end users**
 - 65, but may fluctuate between 50 – 100 depending on funding support.
- 2) **Number of locations**
 - Headquarters 400 Poydras Street, New Orleans, LA 70130
 - Currently, most staff are hybrid remote workers.
- 3) **Virtual and Physical Server counts (current levels, may vary with future needs)**

Production Rackspace (3 locations/server rooms)

 - New Orleans Office
 - One Physical Server
 - Baton Rouge Data Center (Venyu Systems)
 - Qty 5 Physical System
 - Qty 52 Virtual Machines
 - Shreveport Data Center (Venyu Systems)
 - Qty 5 Physical Servers
 - Qty 55 Virtual Machines

Disaster Recovery and Business Continuance: (Microsoft Cloud)
- 4) **Cloud services:**
 - SharePoint, OneDrive, Office 365, and Server Backups (N-Able)
- 5) **Current IT Staffing**
 - Help Desk – CommTech/local System Administrator
 - Network Admin: CommTech/local System Administrator
 - Development Team: Internal ITS Team and CommTech
- 6) **Projected IT Staffing (after MSP engagement)**
 - Help Desk—Level One support: MSP to indicate optimum engagement
 - Network Admin: MSP to provide or describe equivalent arrangement
 - Development Team: Internal ITS Team with guidance from MSP
- 7) **Current obvious pain points or end user issues**
 - Non-tech savvy end users
 - Aging servers and storage
 - Undocumented and overly complex processes
 - Laptop performance issues not covered by warranty
- 8) **Helpdesk tickets per month:**
 - Over the past 6 months we averaged 150 tickets per month.
- 9) **Storage solutions**
 - Main Office (Corp HQ)
 - NAS storage Solution
 - Redundancy built in across servers at multiple locations.
 - Baton Rouge Data Center (Venyu System)
 - DellEMC Compellent (87Tb)
 - Dell PowerStore 500T (10Tb)
 - 3 Synology Systems (40Tb total)
 - Shreveport Data Center (Venyu Systems)

- DellEMC Compellent (105Tb)
- Dell PowerStore 1000T (25Tb)
- Archive Storage Server (55Tb)

10) Applications running, Finance, CRM, etc.

- Finance (GP) server - Abila Server.
- SharePoint
- OneDrive
- Microsoft Office Suite

11) Third party components, anti-spam, archive, encryption, etc. for email

- Anti-spam: Microsoft Office 365
- Encryption: Microsoft BitLocker
- Advanced Threat Detection: SentinelOne
- Archive: Cloud based N-Able

12) Current backup solution and business continuity approach

- We use N-Able to back up our VM's.
- SharePoint is backed up to MS 365.
- Office 365 is being backed up to a physical Synology device in the BR Data Center.

13) Network Infrastructure, switches, firewall, and wireless?

- Main Office
 - a. Network Switch: Dell N2048 Age: 2019 (contract service until 10/2023)
 - b. Firewall(s): Fortinet 100F Age: 2019 (contract service until 10/2023)
 - c. Wi-Fi: Ruckus R750U (3) Age: 2022 (warranty until 5/2023)
- Remote Locations
 - a. Core Switches: Dell N2048 (6) Age: 2019 (contract service until 10/2023)
 - b. Firewall: Fortinet 600E (Baton Rouge) Age: 2019 (contract service until 10/2023)
 - c. Firewall: Fortinet 100F (Shreveport) Age: 2019 (contract service until 10/2023)

Appendix B: Vendor Certification

This certification attests to the vendor’s awareness and agreement to the content of this RFP and all accompanying calendar schedules and provisions contained herein.

The vendor must ensure that the following certificate is duly completed and correctly executed by an authorized officer of your company.

This proposal is submitted in response to *Request for Proposal for Managed Service Provide (MSP)* issued by LPHI. The undersigned is a duly authorized officer, and hereby certifies that:

(Vendor Name, Officer Name, Officer Title)

agrees to be bound by the content of this proposal and agrees to comply with the terms, conditions, and provisions of the referenced RFP and any addenda thereto in the event of an award. Exceptions are to be noted as stated in the RFP. The proposal shall remain in effect for a period of 90 calendar days as of the Due Date of the RFP.

The undersigned further certify that their firm (check one):

- IS
- IS NOT

currently debarred, suspended, or proposed for debarment by any federal entity. The undersigned agree to notify **LPHI** of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Person(s) authorized to negotiate on behalf of this firm for the purposes of this RFP are:

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Signature of Authorized Officer:

Name: _____ Title: _____

Signature: _____ Date: _____