

NATIONAL ENDOWMENT FOR FINANCIAL EDUCATION

IT SERVICES AND SUPPORT

REQUEST FOR INFORMATION

Release Date: April 12, 2019

Closing Date: May 10, 2019

SUBMIT THE PROPOSAL TO:

Annette Fowler

Managing Director of Technology

helpdesk@nefe.org

APRIL 12, 2019

NATIONAL ENDOWMENT FOR FINANCIAL EDUCATION

1331 17th St., Suite 1200, Denver, CO 80202

Background

NEFE is a 501(c)(3) nonprofit private operating foundation and independently funded by our own endowment. NEFE is a noncommercial organization free from financial ties to other organizations. All of NEFE's programs are provided at no cost. More information can be found at <https://www.nefe.org/default.aspx>.

We have a staff of 25 in the downtown Denver area. All staff members are based in this office, but many travel and/or work remotely up to a week per month. No members of the staff telecommute on a fulltime basis at this time. NEFE has two fulltime staff members that support the IT needs of the organization for part of their time along with other responsibilities (primarily website management).

Objectives

NEFE seeks a partnership with an IT services provider with the goals of modernizing its IT operations and increasing support levels to ensure a highly available, reliable, and usable information systems environment for all staff.

High-level objectives of the partnership include:

1. Assist with planning and prioritizing IT improvements in a logical and budget-conscious manner
2. Implementing agreed upon critical infrastructure improvements as soon as possible
3. Providing budget estimates for non-critical improvements to include in next annual budget
4. Provide on-going, as-needed, end user IT support and training for NEFE staff
5. Outstanding customer service and carefully documented and observed service level agreements

Technology Context

The following outlines the information systems environment at NEFE. Successful vendors will be able to provide technical support, maintenance, and advisement in the following context and for the specific technologies mentioned:

- Budget—NEFE currently has \$170 million in total assets with an annual operating budget of \$8.5 million. We are looking to increase our investment in IT management and infrastructure to right-size the expenditure to be appropriate for an organization of our size, scope and mission.
- Workstations-- All fulltime staff are provided with Windows laptops or desktops. Currently there are more than 10 different hardware models distributed to staff and no standard software load. Some of the workstations are more than four years old with Windows 7 and need to be replaced as soon as possible for security and performance purposes. Some staff use their personal MACs at work instead of the Windows workstations provided.
- Servers—Several standalone physical hosts with multiple attached virtual machines that utilize local storage on the host (all Windows operating systems). At least one of the hosts is beyond end of life and several of the operating systems are unsupported or in extended support. Opportunity to replace aging hardware and consolidate systems and licenses is preferred.
- Software-- Primary business applications include desktop Microsoft Office 2013, Skype for Business, various Adobe products and MS SharePoint, with an assortment of other software in use on a case-by-case basis. Would like to migrate to Office 365 as soon as possible, but in a safe and methodical manner.

- Email-- On premise Microsoft Exchange server using Office365 protection and Outlook 2013 at the client. Would like to migrate to cloud-based solution as soon as possible, but in a safe and methodical manner.
- Remote access-- Staff access Denver office remotely via a VPN and Windows Terminal Services.
- Backups—Separate agents installed on virtual and physical systems to backup server and workstations to a local NAS device (which is beyond “end of life”). Backups are not tested regularly. Prefer centralized management with backups performed during non-peak work times and tested regularly.
- Web conferencing-- GoToMeeting and Lifesize Cloud clients with conference room cameras and phones.
- Accounting—On premise installation of Microsoft Dynamics.

The following will not be included in this partnership but provided as information regarding the environment:

- Seven externally facing websites, hosted on AWS using DNN for content management and one site using Cascade server for content management. Support for these sites will not be required (already fully supported by other suitable vendors).
- We do not collect credit cards or fundraise. PII collection is generally limited to name, email, company/school, address (never SSN, health or insurance information, driver’s license, etc.) and marketing is strictly limited to U.S.-based audiences.

Services Requested/Anticipated Projects

In March 2019, after recent transition of internal IT management and vendor support, NEFE completed an “Information Technology Assessment” with a third party vendor to assess the current state of the internal technology at the organization. The report included several critical issues and a variety of non-critical technology recommendations that should be addressed through the partnership that we seek in this RFI. This report will be provided to final candidates before proposals/budgets are requested. The following is a summary of these issues and recommendations.

Critical issues to address:

- Replacement of aging servers, devices and workstations that are beyond end-of-life or on unsupported/extended support operating systems
- Lack of hardware/device redundancy
- Backups need to follow current best practices and be tested regularly
- Wired and wireless networks require proper segmenting, administration and permissions
- Anti-virus/anti-malware enterprise administration at workstation and server levels
- Address active directory issues (inactive computers, users, passwords, level, naming)
- Provide administrative control of all NEFE technology systems, including servers, devices and workstations, to internal NEFE IT staff

Ongoing support/services:

If the critical issues above are satisfactorily addressed, it is NEFE's desire to then retain the IT Services partner for the following on-going support services.

NOTE: We don't require 24/7 uptime or support and would generally prefer a lower hourly rate to faster response/higher uptime commitment, as long as we have *excellent* customer service and expectations are well documented in advance in a service level agreement.

- Maintenance and management, including patch/update management, of staff workstations and servers
- Administration, maintenance, and monitoring of network and server infrastructure (including cloud-based software as appropriate)
- Systems outage and incident responses
- Hardware failure response
- Ongoing data backup and disaster-preparedness and recovery planning, preparation, maintenance, verification, and support
- Help desk support services for all staff from 8:30 am-5pm MT. Infrequent after-hours support at a higher hourly rate and slower response time. May require occasional onsite visits, but anticipate most via "remote control". Self-service help desk for staff to request and/or receive support desirable but not required
- Tracking of deployment of software licenses and subscriptions, with regular reporting to administrative staff to assist in license management
- Technical training for key internal IT staff
- User account management, including adding and removing users and assigning appropriate access rights to use

Other projects:

These items will be addressed after critical concerns are mitigated and as time and budget allow in 2019.

- Transition from Skype for Business to another supported instant messenger (ideally MS Teams)
- Transition from on premise Exchange server to cloud-based email for all staff
- Transition from on premise Office 2013 and associated server file storage (possibly including SharePoint Intranet) to cloud-based solution (probably Office 365)
- Creation and execution of hardware replacement plan (possibly including procurement) so that one third of all staff computers and applicable servers are replaced every three years with standard model and software suite. Includes consideration of MAC users and their technology needs.
- Simplify remote access to email, personal folders, file storage, instant messenger while keeping security and privacy in mind
- Establish standards for personal devices (anti-virus, etc.)

Potential future projects/services:

It is not expected that these items will be addressed in 2019, but would like the potential partner to be aware of these future opportunities.

- Assistance with relocation of technology to a new building
- Smart and modern conference room with latest A/V equipment for web conferencing (SmartBoard, camera, audio, etc.)
- Use of encryption on NEFE provided devices and email
- Advisement of management around budgeting, policy, and procedures
- Large group training for staff on core and emerging tools
- Creation and maintenance of general staff-facing documentation of technical systems

Required Submittals

Please note, this is an RFI, is not an RFP; it is a request for you to share information about your firm's capacity and how you'd approach meeting the needs we have. Responses are not expected to include detailed budgets or specific activities. Interested parties should submit the following information to be considered:

- Technology qualifications-- Information about the organization's core competencies and services, specifically with regard to the needs outlined above
- Business qualifications:
 - Years in business
 - Office location(s) and availability for site visits to NEFE office in downtown Denver (likely frequently/regularly during the planning and critical issue phases and periodically during the subsequent "ongoing support" phase)
 - Number of full time staff
 - Other services offered
 - Ticketing system used for clients to request assistance
- Pricing models-- such as price per seat/user/device and hourly rates for professional services
- Nonprofit experience-- demonstrate a familiarity with working in nonprofit organizations by:
 - including references of at least two current or prior nonprofit/higher education clients and
 - providing information regarding any applicable nonprofit discounts

Nondisclosure

This is a confidential process; by participating in this RFI, you agree to maintain confidentiality throughout the duration of the submission process and review stages.

Response and Selection Process

Please email your response to helpdesk@nefe.org. Responses to this Request for Information will be considered on a rolling basis until **5 pm MT on May 10, 2019**. Responses received after that date will not be considered.

Based on responses, up to five (5) respondents may be invited to meet with NEFE leadership and to submit a price quotation for services requested. One (1) vendor will be selected and a contract negotiated for an initial engagement of up to 12 months (June 2019 through May 2020), with a desire to renew on an annual basis beginning in 2020. Please email helpdesk@nefe.org to request clarification on any part of this RFI. No phone calls please.

Contact Information

The sole source of contact for this project is:

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Please note all communication relating to this requirement and the associated procurement process shall be through the Sole Contact. NEFE reserves the right to disqualify any suppliers who make direct contact with any member of the staff other than this contact.