



STATE OF RHODE ISLAND  
OFFICE OF THE GENERAL TREASURER  
RHODE ISLAND STATE HOUSE, ROOM 102  
PROVIDENCE, RHODE ISLAND 02903

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**REQUEST FOR PROPOSALS FOR MANAGED IT SERVICES**

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Issued July 17, 2023

**Proposals due by 4:00 PM, August 18, 2023**

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See p. 7 Submission of Responses

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# REQUEST FOR PROPOSALS

## to provide Managed IT Services

### **SECTION I: INTRODUCTION AND PURPOSE OF THE RFP**

The State of Rhode Island, Office of the General Treasurer requests proposals from qualified firms interested in providing Managed IT services to the Treasurer's Office. The General Treasurer's office intends to use this RFP process to select a vendor to **co-manage** all or a portion of Treasury's IT environment including but not limited to:

1. Ensuring that all Treasury servers and components are patched in a timely manner.
2. Ensuring that all Treasury windows clients are patched in a timely manner.
3. Providing break fix support for virtual and physical servers.
4. Acting as VMWare subject matter expert for VMware, vCenter and Hyper converged environments
5. Acting as Microsoft subject matter expert for O365 applications including Intune
6. 24x7x365 monitoring of Treasury servers
7. Providing Managed Detection and Response (MDR) services for Treasury clients and servers.
8. Time and materials projects to implement new services.

The vendor chosen as part of this RFP process will be required to enter into a contract with the General Treasurer's Office to provide the services listed in SECTION III: SCOPE OF SERVICES or a portion thereof. RFP responses will be evaluated according to Treasury's needs and a particular respondent's ability to provide the services required. A vendor's inability to provide a service will not preclude the possibility of an award to that vendor. Initial contract term will be one year with two additional renewals at Treasury's discretion.

Vendors who do not offer the full scope of services requested may partner with another provider for the purpose of a complete response.

### **SECTION II: DESCRIPTION OF TREASURY IT ENVIRONMENT**

Treasury users occupy three locations across the state, one in Warwick and two in Providence. The staff utilize Microsoft O365 managed by Intune for their productivity applications. The IT environment also includes twelve virtual windows servers running in a hyper converged environment managed by vCenter with HPE Simplivity storage management, WSUS, backup and print services and production applications. Server and O365 user data is regularly backed up to the cloud and an on-premises storage system.

Treasury is a customer of the state of Rhode Island IT services organization known as DoIT and receives a number of services from that organization including;

1. Enterprise Networking and Firewall services,

2. Content management,
3. VPN,
4. Vulnerability scanning services

### **SECTION III: SCOPE OF SERVICES**

#### Servers:

1. 24x7x365 break/fix support for physical and virtual servers including but not limited to:
  - maximum 30 minute call back response to new trouble tickets,
  - remote troubleshooting of hardware failures
  - incident remediation
  - access to vendor's ticketing system to view progress toward resolution.
2. 24x7x365 trouble desk support for server related trouble tickets opened by Treasury IT staff.
3. 24x7x365 server monitoring to include but not limited to:
  - Actionable event notification i.e. up/down status
  - Common cause and fault identification
  - Third party call management
  - System utilization vs. thresholds, i.e. disk and cpu
4. Apply new non-emergency Windows patches following a schedule agreed upon with the customer. Emergency updates/patches will be applied as soon as possible. The server patch management program will include windows, ESXi and HPE Simplivity.
5. Apply VMware, vCenter/vSphere and Simplivity patches as required to maintain compliance and usability of the systems.
6. Apply firmware updates as required
7. DHCP, DNS and Active Directory Management
8. Backup management – monitor server backups to ensure that server data and images are backed up according to Treasury backup schedule.
9. Act as subject matter expert for Treasury IT staff for questions related to Windows Server, ESXi, vCenter/vSphere and HPE Simplivity.

#### Windows Clients

1. Apply new non-emergency patches on a schedule agreed upon with the customer. Emergency updates/patches will be applied as soon as possible.
2. Act as subject Matter Expert for Treasury IT staff for questions related to Microsoft O365 suite of cloud services.

#### Managed Detection and Response

Provide Managed Detection and Response (MDR) services for all of Treasury's 120 clients and twelve virtual servers. MDR services to include all processes necessary to restore a client or server to the state it was in prior to the incident.

### Support Hours

Selected vendor must be able to provide Managed Services, during the following hours:

1. Business hours Monday through Friday 8:30 – 4:30;
2. Maintenance windows outside business hours; and
3. Emergency support outside of normal business hours as required.

The duties listed in Section III are intended as illustrations of the various types of work that may be required. The omission of specific statements of duties does not exclude them

## **SECTION IV: REQUESTED INFORMATION**

Part A: General Information – Responses to Part A must not exceed 10 pages.

1. Provide the name, title and contact information for the primary contact in connection with your proposal.
2. Provide a summary of the key strengths and any unique abilities of your company to provide Managed Services to Treasury.
3. Provide a brief description of your company, its affiliate and subsidiary corporations, its history in providing managed services and its ownership structure. Discuss the location(s) of the office(s) from which the primary work on this engagement is to be performed.
4. Provide, in tabular form, information on the employee composition of your company indicating the total number of employees and the total number and percentages of minorities and women employed as associates, analysts and clerical/technical support. Provide a summary description of your firm's equal opportunity and affirmative action policy. (This policy description may be included as an Appendix to your proposal.)
5. Provide three example resumes/CVs with the background and qualifications of the individuals who may be assigned to work with Treasury.
6. Provide the name, title, address, telephone number and email address of three client references utilizing HCI and windows clients who Treasury may contact in connection with your proposal. Include length of relationship and a summary of your experience with the client.
7. Has your company had any contracts over the past three years terminated for cause? If so, please explain.
8. Does your company employ a metric such as Net Promoter Score (NPS) to gauge customer satisfaction? Please explain and include your company's current score.

Part B: Information specific to technology and processes

9. Do you provide customers access to a ticketing system which would allow them to track open tickets and communicate with support staff working on the issue?
10. Please explain how your company will monitor Treasury servers and notify Treasury staff if there is an issue. How will your company gain visibility into the internal Treasury network, will your solution require a jump box in Treasury's network, what firewall ports will need to be opened to implement your solution? Can your company support a point-to-point VPN for connectivity into Treasury's network?
11. Please explain the processes followed by your Network Operations Center (NOC) to identify an issue and notify the customer. What is the escalation process and time frame? What tool(s) does your company use to monitor customer assets? What is the SLA response time for customer generated trouble tickets?
12. Explain the process used to keep all of the components of the HCI environment, Windows server, VMware ESXi, vCenter and HPE Simplivity up to the most current patch level.
13. Please explain your OEM maintenance requirements. Does Treasury need to purchase OEM maintenance or does your company provide hardware and/or software maintenance as part of the service?
14. Will your company allow the servers and supporting hardware and software to be co-managed by Treasury staff?
15. Does your company provide patching/update services for Windows clients? If so, please explain your process for updating/patching client workstations, including whether you would use your own client or Treasury's WSUS server.
16. Does your company provide MDR services? If so, please identify the product utilized and explain how alerts are handled. How is the customer first notified and what is the escalation process for issues that remain outstanding after a particular time period? Can the product auto-quarantine upon initial alert? Which firewall ports need to be opened in order to capture actionable telemetry from the client? Are issues triaged by your Security Operations Center (SOC) before they are send to Treasury?
17. If partnering with another vendor, please explain what services this vendor will provide. Will your company be the primary contact for all of the services requested. If not, please explain the call flow for trouble tickets. Has your company worked with this partner on other projects? Please elaborate.
17. Describe the customer onboarding process including required documentation and training for support engineers who will support the account.
18. Is your company SOC 2 Type II or ISO 270001:2013 compliant? If not, please explain how you company protects customer data? If utilizing a partner, is the partner compliant with SOC 2 or ISO? If not, how does that vendor protect customer data?

## **SECTION V: FEES AND BEST AND FINAL OFFERS**

Fees are a material element in awarding the contract pursuant to this RFP. The General Treasurer's Office and/or its agents reserve the right to negotiate fees and request best and final offers. Fees, however, are only one of several factors used to evaluate proposals and the Treasurer's Office may rely on factors other than the lowest level of fees in awarding the contract pursuant to this RFP.

## **SECTION VI: SELECTION PROCESS**

### **SCHEDULE**

RFP Issued	July <b>17</b> , 2023
Deadline for Respondents to submit questions	July <b>31</b> , 2023
Response to questions	<b>August 4</b> , 2023
<b>RFP Responses due</b>	<b>August 18</b> , 2023
Evaluations/interviews	August/September, 2023
Managed services provider selection	September, 2023
Contract negotiations and drafting	September, 2023

### **RESPONDENTS' QUESTIONS**

Questions, should be submitted to Jay David at [Jay.David@treasury.ri.gov](mailto:Jay.David@treasury.ri.gov) no later than 4:00 P.M. Eastern on July **31**, 2023. All questions will be aggregated and posted publicly on the RFP section of [www.treasury.ri.gov](http://www.treasury.ri.gov). Treasury will not answer questions verbally or individually during the RFP process.

## **SECTION VII: MINIMUM QUALIFICATIONS AND SUBMISSION REQUIREMENTS**

In order for Respondent to be considered by Treasury, interested parties submitting proposals in response to this RFP must meet the following Minimum Qualifications:

### Qualifications

- A. The Respondent must demonstrate at least five (5) years' experience providing Managed Services to customers equal in size to Treasury.
- B. The Respondent has sufficient staff to satisfy the scope of services described in this proposal;
- C. The Respondent is in good standing with the State of Rhode Island.

### **Submission Requirements**

- D. To be considered, all proposals must be clearly marked "RFP Managed Services" in the email subject line and include all of the following:
  - 1. Cover letter signed by an individual authorized to commit the company to a

Managed Services contract with the Office of the General Treasurer.

2. Responses to the questions asked and information requested in this RFP;
- E. Proposals may not exceed the page limit specified for Section IV, Part A. Excluded from the page limit are the cover letter and the company's equal opportunity and affirmative action policy description. Brief and concise responses which keep boiler plate information to a minimum are encouraged. Page limits are intended to set limits; not targets.
  - F. Respondents must submit two electronic copies: (1) in PDF format and (1) MS Word format to [rfps@treasury.ri.gov](mailto:rfps@treasury.ri.gov) no later than 4:00 P.M. Eastern Time on August 5, 2023. Proposals received after that deadline will not be considered. Telephoned or faxed submissions will not be considered.
  - G. Treasury reserves the right, in its sole discretion, to reject any and all responses to this RFP, to waive any minor irregularities or informalities in a response to enter into any agreement deemed by the State to be in its best interest.

## **SECTION VIII: EVALUATION OF RESPONSES**

The Managed Services provider will be selected based upon an assessment of the Respondent's ability to provide the services as described above and the Respondent's proposal. The selection process will consider the relevant experience of the Respondent, the strength of the proposal, the demonstrated ability and willingness of the Respondent to structure the best possible delivery of services, and the cost of the proposed services.

During the evaluation process Treasury reserves the right to request additional information or clarification from those submitting responses. Respondents may be asked to participate in a telephone interview, an in-person interview in Rhode Island or an on-site visit at the Respondent's place of business.

The RFP does not commit Treasury to make any selection or to pay any costs incurred in the preparation of the responses or attendance at interviews and the Treasury, in its sole discretion, reserves the right to accept or reject any or all responses received as a result of this RFP, to waive any minor irregularities and nonconformity with the provisions hereof, to negotiate with any qualified source to enter into any agreement deemed by Treasury to be in its best interest., or to cancel this RFP, in part or in its entirety. All proposals shall become the property of Treasury and shall be subject to public records request under R.I. Gen. Laws § 38-2-1 et seq. ("Access to Public Records Act", or "APRA").

## **EVALUATION CRITERIA**

The criteria for evaluation and weight assigned to each are summarized below. Respondents will be evaluated on the basis of their written responses to this RFP, additional written information requested by Treasury and oral interviews, if any, utilizing the following criteria (not necessarily in



order of importance):

a. Experience, Competence, Expertise

40 Points

- a. Experience of the company in providing Managed IT services to large and small customers, supporting hyper converged environments and the hardware and software supporting those environments.
- b. General character of the company including but not limited to key strengths, qualifications, employees' background and experience as well as other factors listed above.
- c. Qualifications and experience of the support team, including experience supporting similar clients and networks.

b. Organizational Characteristics, Administration and Services

40 points

- a. Demonstrated understanding of hyperconverged networks like Treasury's and willingness to co-manage the environment with Treasury IT staff.
- b. Team organization and approach, including the ability of your company to adequately staff to meet customer demands.
- c. Resources and ability to provide full scope of services with in-house personnel and assets.
- d. Security risk framework utilized by your company to reduce risk.
- e. Managed Detection and Response services
- f. Equal employment opportunity record as evidenced by the composition of firm personnel and the firm's affirmative action and equal employment opportunity policies and practices.
- g. Strength of partnership and nature of services offered. Is this a one-time partnership or another joint venture over the course of a long relationship with this partner? Is the partner experienced in providing the particular service(s)?

c. Fees

20 Points

Please itemize for any category of fees with multiple components. If you do not provide a particular service please indicate with N/A.

Service	Cost	Recurrence
Server patching and monitoring as outlined in Section III above including but not limited to: - Backup management	\$	Yearly/Monthly
Client patching as outlined in Section III above	\$	Yearly/Monthly
Managed Detection and Response (MDR) service (price/client)	\$	Yearly/Monthly
Server Subject Matter Expert, (SME) (Windows, ESXi, Simplivity)	\$	Yearly/Monthly

Client Subject Matter Expert (SME) (Windows)	\$	Yearly/Monthly
Cost for patching a new Windows client added to the network by Treasury IT staff.	\$	Yearly/Monthly
Additional cost to monitor and manage a physical or virtual server added to the network	\$	Yearly/Monthly
Physical server	\$	
Virtual server	\$	
Sometime during the life of this contract, it may be necessary for Treasury to add a new server or in some other way alter the current server infrastructure in a way which would be outside the scope of this contract. New projects or enhancements which aren't included in this contract may be considered time and material or fixed price projects. These projects would require system engineers with the appropriate expertise and training to implement the new services and, if the project is large enough, a project manager to oversee and coordinate the work. Hourly rate for new projects – Engineers – Project Managers	\$ \$	Yearly/Monthly
Other fees (please itemize)	\$	

## **SECTION VIII**

### **ADDITIONAL INFORMATION**

1. Treasury reserves the right to request and consider additional information and/or supplements to proposals or to particular proposals after the deadline for initial proposals, until such time as a contract with a particular Respondent is finalized.
2. Treasury will not reimburse for any expenses incurred in connection with this RFP including the cost of preparing the initial responses and any additional information requested and travel expenses related to an oral presentation.

### **CONFIDENTIALITY**

Treasury may treat all information submitted by a Respondent as public information following the conclusion of the selection process unless the Respondent properly identifies and specifies certain information be treated as confidential at the time of submitting the bid proposal. The release of

information is governed by the Access to Public Records Act. Respondents are encouraged to familiarize themselves with this law before submitting a proposal.

Any request for confidential treatment of information must be included in the transmittal letter with the Respondent's bid proposal. In addition, the Respondent must enumerate the specific grounds under APRA or other applicable law which support treatment of the material as confidential and explain why disclosure is not in the best interest of the public. The request for confidential treatment of information must also include the name, address, and telephone number of the person authorized by the Respondent to respond to any inquiries concerning the confidential status of the materials.

Any bid proposal submitted which contains confidential information must be conspicuously marked on the outside as containing confidential information. Identification of the entire bid proposal as confidential will be deemed non-responsive.

If the Respondent designates any portion of the proposal as confidential, the Respondent must submit one additional copy of the bid proposal from which the confidential information has been excised or redacted. The confidential material must be excised in such a way as to allow the public to determine the general nature of the material removed and to retain as much of the bid proposal as possible.