



Request for Proposal

Outsourced IT & Managed Services

ISSUED DATE: 8 MARCH 2024
SUBMISSION DATE: 2 APRIL 2024 AT 6:00PM MDT

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1 Request for Proposal (RFP)

630 CHED Santas Anonymous 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 630 CHED Santas Anonymous over a 2-year period, beginning on 1 July 2024, and ending no later than 30 June 2026. Following the initial term, there is a possibility to renew this contract.

2 Introduction to 630 CHED Santas Anonymous

The mission and mandate of 630 CHED Santas Anonymous (Santas) is simple: to see every child receive a new toy at Christmas. Since Jerry Forbes founded the charity in 1955, that mission has stayed the same.

Relying on thousands of volunteers and donors, Santas now collects, sorts, packages, and delivers toys to over 20,000 children every year.

More than 65 years ago, 1080 CHED's production manager, Jerry Forbes, felt compelled to start Santas Anonymous. In the years since, the board, staff and volunteers of 630 CHED Santas Anonymous have carried the torch, with generations of Edmontonians fulfilling Jerry's dream:

"Wouldn't it be great if there would be no needy kids and every kid had a present? Not a used present – with wheels stuck on and repainted – but a brand new present. From that modest start we said, 'Well, let's do it.' So, we went ahead and for the first few years we ran it up on the second floor here just with my staff and from there it just grew and grew."

Santas achieves its mission through the engagement and support of the community including dedicated governance and program volunteers, professional staff, stakeholders, partners and collaborations, philanthropists (including our annual donors), and other funding organizations. Our recipients, reflect the breadth and diversity of the communities we serve – based on age, gender, culture and socio-economic perspectives. Each year Santas provides services to over 20,000 individuals in our community. Over 90% of those served are under 13 years of age.

3 Overview of Current 630 CHED Santas Anonymous' Technical Environment

- IT Services are currently completely managed by an outside IT service provider
- 630 CHED Santas Anonymous is a seasonal charity. It has 3 IT users year-round; however, increases to 5 users between October and December each year.
- We operate in a PC environment
- We currently operate using our IT's servers, which are located remotely.
- Servers are backed up twice daily with image-based backups, encrypted with 256 AES. 30 days offsite retention. Backups of critical servers are tested twice a year.
- Current hardware consists of laptops with docking stations from 2022.

4 Value Added Service Requirements

As part of this RFP, the following services are the current priority items for 630 CHED Santas Anonymous:

- **Remote backup** – Executing a nightly backup plan for the critical servers, including a regularly-tested recovery process.
- **Technology strategy planning** – Working with current IT staff to develop a long term strategic technology plan. 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.

- **Cyber-security** – maintain up-to-date cyber security practices and infrastructure and ensure timely updates.
- **Solution design** – Solution packages (e.g., hardware, software, licensing) and associated consolidation of data
- **Network and email system monitoring** – 24/7 monitoring of 630 CHED Santas Anonymous's network and email services with 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.
- **Move, Add, Change (MAC)** – Changes to the location or configuration of existing equipment or software, and installation of additional equipment or software, as required.
- **Warranty, break fixes and installation** – Planned and on-call services, including emergency response to server issues.
- **Technical support** – Ability to support 630 CHED Santas Anonymous's inquiries as required, via help desk, including support for remote users.
- **Reporting and communication** – Ensuring monthly reporting on all purchases, assets, current activities and issues, and project status reports.
- **Unit evaluation and testing** – Formal evaluation of new hardware
- **Configuration** – Full assembly of hardware and software, including testing and burn-in.
- **PC deployment** – Delivery and setup of machines on-site and/or remotely.
- **Life cycle management of hardware units** – Process for end-of-life notification, replacement, and asset decommissioning/disposal.
- **Software licensing control** – Oversight of automatic renewal of software applications and maintenance of appropriate documentation

5 Selection Criteria

630 CHED Santas Anonymous 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 their overall weighting.

- Industry expertise and experience
- Demonstrated customer service quality and support
- Previous relevant experience
- Vendor strength and stability
- Account management
- Reporting capabilities
- Financial considerations

6 Response Contents and Format

Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Your response to this RFP will serve as the basis for the consideration of your potential as a partner.

7 Information Requirements

For the purposes of understanding more about your company and your ability to successfully fulfill this important 630 CHED Santas Anonymous requirement, please provide the information below as part of your response, clearly referencing each specific question.

7.1 Corporate Information

1. Give a brief overview of your organization's involvement in providing IT value added services in the marketplace.
2. How long has the organization been in this business and what is your current market share?
3. In what Canadian cities do you maintain offices?
4. Indicate the number of employees in your organization. How many of those are dedicated to account management and/or technical support?
5. How many are full-time vs. contract?
6. Please describe your relationships and experience with manufacturers and major distribution partners in the Canadian technology marketplace.
7. What differentiates your organization from your competitors in the marketplace and how will this be relevant to us?
8. Will you subcontract any components of the proposed solution to third party organizations? If so, please describe the components to be subcontracted and provide details of any agreement in place with the subcontracted firm/individuals as well as a summary of past work that you have successfully completed together.
9. Please describe your organization's experience in transitioning clients to cloud technology from more traditional IT service models.
10. Please provide details of three current customer accounts that are similar in scope and requirements to those of 630 CHED Santas Anonymous.

7.2 Proposed Approach and Solution

1. Please provide a proposed work plan for a migration to your organization as a 630 CHED Santas Anonymous preferred vendor. Specifically, provide the following information:
 - i. Key activities
 - ii. Timing
 - iii. Information/resource requirements from 630 CHED Santas Anonymous
 - iv. Deliverables
 - v. Key milestones, checkpoints, and other decision points
2. If we elect to move forward with your organization, what 630 CHED Santas Anonymous resources would you require (e.g., information, data, staff resources, communication) during the course of migration and on an ongoing basis?
3. 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 630 CHED Santas Anonymous.
4. Please describe your experience in providing the following value-added services:
 - a. Remote backup
 - b. Technology strategy planning
 - c. Approach to up-to-date Cyber Security
 - d. Solution design
 - e. Network and email system monitoring
 - f. Procurement management
 - g. Move, Add, Change (MAC)
 - h. Warranty, break fixes and installation
 - i. Technical support, including remote user support
 - j. Reporting and communication
 - k. Unit evaluation and testing
 - l. Implementation planning and guidance
 - m. Configuration
 - n. PC deployment
 - o. Life cycle management of hardware units
 - p. Software licensing control

5. Please describe your experience in providing server technology and service for your customers, focusing on planning, implementation, and ongoing support.
6. Can you provide specific examples of how you have worked with customers that began with significant technology limitations and helped to successfully transform them into organizations with well planned and executed technology strategies? What were the critical success factors in this transformation?
7. How can we be confident that hardware pricing levels will be aggressive and will remain highly competitive over a multi-year period during which new models may be introduced?

7.3 Support

1. Describe fully your technical support options including the assistance request process, escalation process, support hours, response times, staffing levels, staff expertise, and physical location of the help desk.
2. Please provide details on your standard reporting capabilities.
3. What options are available for user training and technical training that may be required by our staff?
4. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?
5. The 630 CHED Santas Anonymous user base varies considerably in its level of technical sophistication. Please describe your experience in successfully supporting users that may be remote and possess limited technical skills.

7.4 Financials

1. Describe the pricing model(s) that you typically employ for your standard services.
2. What is the standard markup that you charge on the following types of technology units:
 - a. Desktops
 - b. Laptops
 - c. Other hardware
 - d. Software
3. Please indicate the charges associated with each of the following services in Canadian dollars, including the key driver of each cost and whether it is included in a standard per-unit cost vs. charged on an ad hoc basis.
 - a. Remote backup
 - b. Technology strategy planning
 - c. Solution design
 - d. Network and email system monitoring
 - e. Procurement management
 - f. Move, Add, Change (MAC)
 - g. Warranty, break fixes and installation
 - h. Technical support
 - i. Reporting and communication
 - j. Unit evaluation and testing
 - k. Implementation planning and guidance
 - l. Configuration
 - m. PC deployment
 - n. Life cycle management of hardware units
 - o. Software licensing control
4. Do you offer service bundles and if so, describe the effect of this bundling on pricing.

8 **Communications and Response**

Angel Benedict is the designated 630 CHED Santas Anonymous representative for this initiative. For any information relative to this RFP, please direct all inquiries to her contact information is as follows:

Angel Benedict
630 CHED Santas Anonymous
angel@santasanonymous.ca
587-855-1519

9 **Notification of Intent to Respond and Clarification Questions**

Please indicate your intention to respond, by email, to the above email address by March 18, 2024, as 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 March 22, 2024.

10 **Response Delivery Instructions**

Please submit an electronic copy of your proposal to the email address indicated in the Communications and Response section above. All responses must be received on or before April 2, 2024 at 6 pm MDT, as indicated in the Key Dates table below.

11 **Vendor Presentations**

Our intention is to hold presentations/demonstrations with one or more firms on the third week of April 2024, as indicated in the Key Dates table below. The presentations will be virtually, and we will endeavour to provide the successful firms with as much advance notice as possible.

12 **Key Dates**

Event	RFP Issued	Intent to Respond and Questions Due	Answers Provided	Proposals Due	Presentations
Date	March 8, 2024	March 18, 2024	March 22, 2024	April 2, 2024	April 17, 2024 (TBC)
Time	8 am MDT	6 pm MDT	6 pm MDT	6 pm MDT	TBC

13 **No Obligation**

The submission of a proposal shall not in any manner oblige 630 CHED Santas Anonymous to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.

14 **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 630 CHED Santas Anonymous solely for the benefit of 630 CHED Santas Anonymous.

15 **No Guarantee**

630 CHED Santas Anonymous makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.