Request for Proposals:
Managed Technology Services

June 15th, 2023
Table of Contents

Introduction ........................................................................................................................................... 3
About Land of Lincoln Legal Aid ........................................................................................................ 3
State of Technology ............................................................................................................................... 4
Technology Summary .......................................................................................................................... 4
On-Site Support Requirements ........................................................................................................... 4
Proposal Criteria ..................................................................................................................................... 5
Vendor Questionnaire ........................................................................................................................... 5
Requirements ........................................................................................................................................ 5
Pricing .................................................................................................................................................... 5
Past Performance .................................................................................................................................... 6
Personnel Qualifications and Experience ............................................................................................ 6
RFP Process .......................................................................................................................................... 6
Proposal Preparation ............................................................................................................................. 6
Evaluation Criteria ............................................................................................................................... 7
Proposal Contact and Delivery ............................................................................................................ 7
Clarification and Information Requests ................................................................................................ 7
Acceptance of Proposals ...................................................................................................................... 8
Confidentiality ........................................................................................................................................ 8
Appendix 1: Locations .......................................................................................................................... 8
Introduction

Land of Lincoln Legal Aid (“Land of Lincoln”) is a nonprofit organization with headquarters in East St. Louis, Illinois and offices in central and Southern Illinois. We are seeking a Managed Services Provider (MSP) to manage technical systems, support system and application use by our users, and act as a collaborative partner helping Land of Lincoln use technology strategically to further our mission. The best provider for Land of Lincoln will:

- Have the capacity to support, monitor, manage, and secure our technology platform, which is largely cloud-based and moving further in that direction, but still includes some on premise servers and infrastructure. The vendor that we select must have the capacity, either internally or outsourced, to physically support our nine locations, listed in Appendix 1.
- Have a full understanding of how nonprofits use and budget for technology, with an understanding that we will, by necessity, look for affordable solutions, sometimes prioritizing cost over quality.
- Be knowledgeable about legal services-specific technology such as case management and document management. Land of Lincoln will prioritize respondents with broad experience supporting nonprofit organizations and legal aid providers.
- Act as a strategic partner and advisor for an organization with critical technology needs and light technology staffing.

About Land of Lincoln Legal Aid

Land of Lincoln is an effective, high-quality legal services program with a mission to provide free civil legal services to low-income individuals and senior citizens in 65 counties in central and southern Illinois. We believe all people of central and southern Illinois should have access to justice, income security, adequate housing, quality education, healthcare, safety from violence and exploitation, and the opportunity to improve their own lives.

Our team handles certain kinds of civil cases. The kind of help we provide our clients ranges from telephone advice and brief service to representation in court or at administrative hearings. We provide legal assistance in the following areas of law:

- Consumer Law
- Family Law
- Education Law
- Elder Law & Disability Rights
- Health & Economic Security
- Housing Law

The type of service we can provide depends on the specific legal problem, information about the case, and staff availability.
State of Technology
Land of Lincoln is in the process of moving from a server-based environment to the cloud. The bulk of our applications are Cloud-based. The bulk of our work product is in SharePoint on Microsoft 365. We are in the process of migrating the few remaining documents from shared folders on local servers to SharePoint. Once that project is completed, Land of Lincoln will identify the remaining local server functions and replace them with Azure AD and other cloud-based services as needed. Most servers will be retired, but Land of Lincoln will retain a locally installed VOIP PBX and each office’s routers, firewalls, and switches.

Technology is jointly managed by the Deputy Director of Finance and Administration and a Managing Attorney. There are no dedicated IT staff, but tech-savvy users provide a layer of internal support.

Technology Summary
- Land of Lincoln has approximately 150 staff total (we will use 150 as the baseline for pricing) with approximately 20+ interns throughout the calendar year
- Computers are primarily Windows 10 desktops and laptops.
- There are four servers, all virtualized on a single host in the East St. Louis office.
- Most infrastructure equipment is Fortinet, but there are also HP and other switches in use.
- Staff use MFA to access most SaaS services. KnowBe4 is provided by a major funder, but in a limited fashion.
- Main Software:

<table>
<thead>
<tr>
<th>Function</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance</td>
<td>MIP</td>
</tr>
<tr>
<td>Case Management</td>
<td>LegalServer¹</td>
</tr>
<tr>
<td>Document Management</td>
<td>Office 365/SharePoint</td>
</tr>
<tr>
<td>Office Productivity</td>
<td>Office 365</td>
</tr>
<tr>
<td>Phone System</td>
<td>Avaya</td>
</tr>
<tr>
<td>Additional Tools</td>
<td></td>
</tr>
</tbody>
</table>

On-Site Support Requirements
Land of Lincoln anticipates that most support issues will be handled remotely, but that there will be occasional need for on-site visits at each of the nine locations (a full location list is in appendix 1) in situations where the issue is with infrastructure such as switches, routers, firewalls, or one of the remaining servers and remote remediation is not possible. If the RFP respondent does not have offices in Illinois, then they should explain in their proposal how they would address on-site support issues and any ramifications on the cost of the service. Land of Lincoln assumes that having local staff or a subcontract with a local service provider will be more affordable than flying staff out from outside Illinois.

¹ https://www.legalservers.org/
Request for Proposals: Managed Services Provider

Proposal Criteria
Completion of all elements of the proposal criteria (including the attached requirements spreadsheet) is necessary for consideration of your proposal. While supplemental materials are welcome, all questions should be answered. Additional materials can be referenced as more information, but should not be required in order to understand the answer, except as specifically allowed. This guidance applies to the requirements spreadsheet as well as the questionnaire.

Vendor Questionnaire
1. Please provide your full company name, address, and contact information

2. How many years have you been in business?

3. How many staff do you have? If this number includes contractors, please specify how many you employ and how many are independent.

4. What percentage of your client base consists of nonprofit organizations? If you support a significant number of associations, please specify the percentage of 501(C)(3) corporations.

5. What geographical areas (e.g. cities, regions) do you provide services to?

6. What is your average staff turnover rate for the last three years?

Requirements
Please fill out the attached spreadsheet completely. If the spreadsheet format is not optimal for providing detailed comments, then the comments can be provided in a separate document with appropriate referencing to the requirement section and number.

Pricing
Land of Lincoln seeks a pricing estimate for 24/7 remote support; minimal on-site support as described above; and desktop/laptop/server patch management and malware protection for 150 users (“desktops”) and four servers. We also seek a listing of prices for additional services, such as strategic consulting and project-based work. The pricing quote should make very clear the distinctions between what is included in any base pricing and what is available a la carte.

Land of Lincoln assumes that most pricing submissions will include a “per desktop” and “per server” cost that includes a base set of services, and then have a la carte choices for additional services. For example, 8:00 am to 5:00 pm off-site support might be part of the base price, and after hours available at a separate rate. If you do not price according to this model, please do your best to present your pricing in such a way that we can do an apples to apples comparison. For example, if you provide a base monthly fee that is not based on the number of desktops, note that, but divide it by 150 in order to fill in the table below.
Past Performance
Please provide three references from managed services customers. These references should be, to the best of your ability, similarly sized 501(C)(3) nonprofits, ideally based in Central or Southern Illinois or Eastern Missouri. Include the company name, contact name, email, and phone number, duration of your relationship (note if they are not current customers), and a brief description of the services provided.

Personnel Qualifications and Experience
Provide representative resumes for at least three employees that might be assigned to our account should we hire you: a support technician, an engineer, and an account representative.

RFP Process
Proposal Preparation
Proposals shall be submitted electronically via email. Preferably in PDF or Microsoft Office formats. If additional materials, such as pamphlets and answers to Frequently Asked Questions (“FAQs”) are responsive to this RFP, then they should also be included as part of the proposal as attachments. It is acceptable to link to web-based information in your response, but please verify that your links are correct and functional for viewers who are not on your domain. As stated above, additional materials should be supplemental to answers provided in the questionnaire and requirements spreadsheet, and not serve as answers in and of themselves, except as noted that this is acceptable.
Evaluation Criteria

- A clear and concise understanding of the requirements.
- A demonstrated ability to meet Land of Lincoln’s core requirements.
- Pricing
- Past performance
- Personnel qualifications and expertise

Proposal Contact and Delivery

Proposals should be delivered electronically via email on or before 5:00 p.m., EDT, on July 6th, 2023. Send proposals to:

Peter Campbell  
Principal Consultant  
Techcafeteria  
pcampbell@techcafeteria.com

Calvin Hwang  
Deputy Director of Finance and Administration  
Land of Lincoln Legal Aid  
chwang@lincolnlegal.org

Applicants are solely responsible for ensuring that proposals are delivered on time. Late proposals will not be accepted. Delays caused by any delivery service will not be grounds for extension of the proposal due date and time. Proposals received after the deadline will not be accepted. All costs incurred in preparing proposals shall be borne by the applicant. Any final contract awarded will not provide for costs of the proposal to the applicant.

Clarification and Information Requests

Requests for further information or clarification of the information in this RFP should be submitted by email to Peter Campbell at pcampbell@techcafeteria.com and Calvin Hwang at mailto:chwang@lincolnlegal.org. The deadline for further questions and clarifications is 5:00 p.m., CDT, on June 21st, 2023. Answers to these requests will be copied to all RFP recipients that inform Land of Lincoln that they are participating, by end of day on June 19th, 2023.

Schedule

<table>
<thead>
<tr>
<th>Description</th>
<th>Deadline</th>
<th>Party Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Issued</td>
<td>6/15/2023</td>
<td>Land of Lincoln</td>
</tr>
<tr>
<td>Notification of intent to participate due</td>
<td>6/19/2023 5:00 PM CST</td>
<td>Applicant</td>
</tr>
<tr>
<td>Questions on RFP due</td>
<td>6/21/2023 5:00 PM CST</td>
<td>Applicant</td>
</tr>
<tr>
<td>Responses to questions due</td>
<td>6/26/2023 5:00 PM CST</td>
<td>Land of Lincoln</td>
</tr>
<tr>
<td>Proposals due</td>
<td>7/6/2023 5:00 PM 2023</td>
<td>Applicant</td>
</tr>
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</table>
Acceptance of Proposals
Land of Lincoln may accept or reject any or all proposals submitted in response to this RFP.

Confidentiality
Land of Lincoln and the RFP respondents hereby acknowledge that, in the course of fulfilling their respective obligations under this engagement, Land of Lincoln and the RFP respondent may be given access to the other party’s confidential or proprietary information. Neither party shall use such proprietary information for the benefit of any third party, whether or not for consideration, and shall not sell, rent, loan, copy or make available any of the other party’s proprietary information to any person or entity. Neither party shall disclose or otherwise communicate any of the other party’s proprietary information to others, in whole or in part, except to such limited number of that party’s employees, agents, and consultants and only to the extent that is reasonably necessary to enable that party to fulfill its obligations and exercise its rights under this engagement until such time as the proprietary information becomes available to the public as non-confidential information through no act or fault of that party.

Appendix 1: Locations

<table>
<thead>
<tr>
<th>Office</th>
<th>Address</th>
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<tbody>
<tr>
<td>Administrative Office/Central Regional Office/LARC – Legal Advice Hotline</td>
<td>Dorothy O. Cook Community Law Center 8787 State Street, Suite 201 East St. Louis, IL 62203-2026</td>
</tr>
<tr>
<td>Western Regional Office (WRO)</td>
<td>111 East Fourth Street, Suite 330 Alton, Illinois 62002</td>
</tr>
<tr>
<td>Quincy Office (Satellite to WRO)</td>
<td>926 Broadway Suite C, Quincy Illinois 62301</td>
</tr>
<tr>
<td>Northern Regional Office (NRO)</td>
<td>3085 Stevenson Drive, Suite 202 Springfield, IL 62703</td>
</tr>
<tr>
<td>Eastern Regional Office (ERO)</td>
<td>302 North First Street Champaign, Illinois 61820</td>
</tr>
<tr>
<td>Decatur (Satellite #1 to ERO)</td>
<td>1620 S Taylorville Rd, Decatur, Illinois 62521</td>
</tr>
<tr>
<td>Charleston (Satellite #2 to ERO)</td>
<td>737 Windsor Rd, Charleston, Illinois 61920</td>
</tr>
<tr>
<td>Southern Regional Office (SRO)</td>
<td>First Mid Illinois Bank Building, Third Floor 509 South University Avenue Carbondale, Illinois 62901</td>
</tr>
<tr>
<td>Mt. Vernon (Satellite to SRO)</td>
<td>1702 Broadway St Suite B, Mt. Vernon, Illinois 62864</td>
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