



**Advertisement Detail**

**ECKERD YOUTH ALTERNATIVES, INC.**

**INVITATION TO NEGOTIATE**

**Information Technology Service Management  
Managed Services Outsourcing**

**ITN Number: ITN-EC-ITSMMSPO**

Version Number: 001

ITN Release Date/Time: 3/8/2021 - 9:00 AM EST

Response Due Date/Time: 4/7/2021 - 4:00 PM EST

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Proprietary - Eckerd Connects

## I. Organizational Overview

Eckerd Youth Alternatives, Inc. D/B/A Eckerd Connects (Eckerd) is a national, non-profit 501(c)(3) organization, headquartered in Clearwater, Florida, operating a full continuum of Workforce Development, Job Corps Juvenile Justice, Behavioral Health, Educational, and Child Welfare programs around the country. Eckerd is an experienced Health and Human Services provider in over 170+ locations in dynamic service settings across 20 states and the District of Columbia. Eckerd serves more than 40,000 children, youth, young adults, adults, and families each year. The Eckerd mission is to *“Provide and share solutions that promote the well-being of children, young adults, and families in need of a second chance.”* Eckerd is one of the largest privately managed non-profit organizations in the country, offering a diverse platform of services working with more than 100 funders throughout the country. Eckerd is a value driven organization dedicated to a superior quality and a client first service methodology.

During the past five years Eckerd has experienced significant growth, increasing annual operating revenue from approximately \$180M to \$354M. This growth has occurred organically via adding new contracts through the competitive bid process and has also occurred via several large-scale mergers and acquisitions with other service providing organizations. As the Eckerd organization has grown and transformed, the need for personalized, unique, full service, high quality Information Technology Service Management has been and remains a critical priority.

Eckerd interfaces with over 100 individual funders across the country and is required to align technology solutions with a number of high security reporting systems, including child welfare SACWIS systems, Juvenile Justice Information Systems, numerous Workforce Innovation and Opportunity Act state reporting systems, and many other unique state or local systems. Further, Eckerd hardware is composed of managed services inventory, subcontractor inventory, and additional inventory managed by Eckerd but wholly owned by our funders. Eckerd currently outsources all Information Technology Service Management (ITSM) responsibilities to several Partner-Vendors.

## II. Invitation for Negotiate

Eckerd is issuing this Invitation to Negotiate (ITN) seeking Information Technology Service Management (ITSM) Managed Services. ITSM Managed Services includes, but is not limited to the processes and activities required to identify, create, deliver and support the services identified below which minimally represent Information Technology Service, Support, Maintenance and Operational Readiness responsibilities for our entire Enterprise, comprising over 2,000 unique supported users across 170+ locations in 20 States and the District of Columbia. The anticipated term of the contract resulting from this ITN is three (3) years with the option to extend for two (2) additional years as assessed on an annual basis. Following the initial three-year term, ITSM Managed Services will be evaluated on an annual basis to determine if the contract will be extended for one, or both, of the two option years. The anticipated contract start date is July 1, 2021. Current ITSM Managed Services encompass the following:

### **Managed Services Overview**

- End User / Desktop Service & Support
- Physical and Virtual Server Infrastructure
- Technology and End-User Asset Procurement, Management and Inventory Management & Reporting
- Vendor Management
- Operational Readiness responsibilities

- Performance, Analytics and Monitoring

Eckerd’s IT Customers present an extremely diverse and geographically dispersed support need across multiple programs in (5) primary service models across 20 States and 170+ locations (locations and supported customer data contained in Attachments A and B). The nature of our work in each of the identified service delivery area’s is very fluid / dynamic and requires an agile, flexible, personalized, and responsive support model. Additionally, the Eckerd organization continues to grow at a steady pace, with anticipated annual expansion projected at a rate of approximately 5% per year. The primary service delivery areas encompass:

- Child Welfare Programs
- Juvenile Justice Programs
- Residential Programs
- Community Based Programs
- Workforce Development Programs

IT Services for Eckerd customers (staff, supported sub-contractors and supported Community Partners) are currently provided, through a centralized IT Help Desk and most support is provided remotely for all service models except the Community Based Care (CBC) Child Welfare Programs in Hillsborough, Pinellas, and Pasco Counties (Florida). These local CBC programs experience high-volume service and incident support needs due to high direct-care staff turnover, and a personalized, individualized, high-touch level of support inherent to this type of work. Eckerd Workforce and supported customers are mobile users, working at client locations, our program offices, and throughout the community; the primary technology tool required for their jobs is a laptop configured with a VPN client. Remote access to business-critical applications is required for our staff and supported customers 24/7/365. Due to the nature of our operations and limitations and restrictions of funder contracts, Eckerd maintains a limited supply of on-hand inventory, spares, or “loaner” devices which, at time, significantly impacts the immediate availability of devices for direct-services staff. In addition to the specifications listed herein, rapid procurement, configuration, and deployment of PC assets, directly from vendor, or from inventory, is an area which will be critical to any successful and ongoing support model. Additionally, each of our over 100 funder’s require mandatory asset management, accountability, and reporting requirements unique to the Funder and that must be met, real-time.

### III. Instructions for Responding to the ITN

**Respondents are invited to participate in this procurement by responding to all or some of the aspects of this ITN.** This ITN does not commit Eckerd to contract for any services or make any type of award. Respondents are advised that Eckerd will not pay for costs incurred in response to this ITN; all costs associated with responding to this ITN will be solely at the interested party’s expense. It is the responsibility of the potential respondents to monitor this ITN announcement for additional information pertaining to this solicitation.

#### A. Contact Person

The designated “single point of contact” for this ITN is:

<b>Name:</b>	Gary Bryant
<b>Title:</b>	Procurement Management Consultant
<b>Location:</b>	Tallahassee, FL
<b>Phone:</b>	850-933-7577

<b>Email:</b>	ECITSM@eckerd.org
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**B. Response Submission**

All responses must be received by Eckerd, addressed to the ITN Contact Person, named in Section III., on or before the following date:

**April 7, 2021 4:00 PM EST Eastern Standard Time**

No changes, modifications or additions to the responses submitted will be accepted by or be binding to Eckerd after the deadline for submitting proposals has passed. Responses not received as specified will not be accepted.

**C. Proposed Schedule of Events and Deadlines**

<b>ACTIVITY</b>	<b>DUE DATE</b>	<b>TIME</b>	<b>LOCATION</b>
A. ITN posted on the Eckerd website.	3/8/2021	9:00 AM EST	<a href="http://www.eckerd.org">www.eckerd.org</a>
B. Deadline to submit written questions	3/17/2021	4:00 PM EST	
C. Response to written questions posted	3/24/2021	4:00 PM EST	
D. Deadline to submit Responses	4/7/2021	4:00 PM EST	Only Electronic Copies Will Be Accepted: ECITSM@eckerd.org  ** All responses submitted beyond the established deadline will not be accepted. **
E. Scoring of the responses completed	4/23/2021	5:00 PM EST	
F. Short List Presentations scheduled for	4/26/2021 - 5/7/2021	5:00 PM EST	
G. Contract Negotiations	5/10/2021 – 5/28/20/21		
H. Contract Start Date	7/1/2021		

**D. Number of Copies and Original Signature**

Vendors shall submit **one original electronic copy** of their reply. The original reply submitted must contain an **original signature of an official authorized to bind the vendor**.

**E. Electronic Reply**

The complete electronic response to the proposal must be submitted according to the solicitation timeframes indicated in Section III.C of this ITN. Respondents are required to include **Eckerd ITSM ITN Response** and the **Respondent Organizational Name** as the subject line of the email.

## **F. Reply Format**

Replies must be typed, single-spaced, on 8-1/2" x 11" paper. Pages must be numbered in a logical, consistent fashion.

## **G. Contents and Order of the Reply**

### **TITLE PAGE**

The first page of the reply shall be a Title Page that contains the following information:

- Title of reply;
- ITN number;
- Vendor's name
- Name, title, telephone number and address of person who can respond to inquiries regarding the reply;
- Signature of official authorized to approve submission and content of the response; and
- Date of reply.

### **TAB 1: TABLE OF CONTENTS**

### **TAB 2: SPECIALIZED EXPERIENCE AND TECHNICAL COMPETENCE**

- Describe vendor's approach and philosophy, including mission statement, core values, and vision
- Describe your organizations "giving" or philanthropical culture
- Demonstrate an understanding of the needs specified in this ITN and discuss/demonstrate the ability to fully execute the Scope of Work. Provide the following:
  - an overview of organizational qualifications, experience, geographic support footprint, and capacity in Information Technology Service Management (ITSM), with a specific emphasis on supporting customers operating in any of the (5) primary service delivery areas identified in Section II
  - a description of the vendor's organization, Discuss a minimum of three projects similar in size and scope to the ITSM services being procured via this ITN; include reference contact information for the projects described (contact name, title, physical address, email, and phone number)

### **Include the following information:**

- Full legal name
- Describe vendor's approach and philosophy.
- Describe vendor's organizational structure, depicting clear lines of authority including corporate affiliations; describe how the structure represents a lean, efficient, and effective administrative model.
- Description of the vendor's organization and organizational history including number of years in business, subsidiaries, and/or parent corporations.
- The vendor shall provide a current CV for, and describe the qualifications and credentials of, their key leadership, Senior Service & Support, Engineering / Infrastructure, and O365 Subject Matter Expert (SME) team members, as applicable, with an explanation of how

these individuals are qualified to lead and support their organization in meeting the needs of this ITN.

### **TAB 3 SCOPE OF WORK**

Provide a detailed response following the format detailed in **Section III.H** of this ITN. Please include the specific ITN question prior to each narrative response detailing the proposed vendor solution. Failure to adhere to page limitations and other specifications detailed within this ITN may result in disqualification. Please limit the written response to the **Scope of Work** to a maximum of 40 pages.

### **TAB 4: PRICING METHODOLOGY**

Fully outline the pricing model for each component the vendor is submitting a bid. If proposing models that include a price per user or price per device, outline how that would be tracked and charged. For example, if users/machines are adjusted daily, monthly, quarterly, etc. If there is any type of tiered pricing, please explain the rationale. Indicate at what intervals pricing would be re-evaluated based on percentage increases or decrease in volume of users/machines. Provide pricing for each year over the term of the contract assuming a 5% increase in the number of users. Provide any markup, above supplier quoted pricing, that vendor proposes for procurement support. For “new” program location startups and existing program closures, regardless of location, provide any additional onboarding and offboarding costs and how costs are calculated. Pricing model should also stipulate limitations on quarterly true-up quantity variances.

### **H. Written Response Information**

The vendor shall describe the approach to performing the tasks described below and how the vendor solution will meet Eckerd’s detailed requirements. The vendor shall describe any relevant experience providing any or all of the requested ITSM Services to customers operating in any of the (5) primary service delivery areas identified in Section II. Vendors should format the proposal response so that each task and service area defined below is clearly delineated and the vendor solution is clearly described. Specifically, the vendor must explain in detail the proposed activities, services, and solutions related to:

#### **1. End User / Desktop Service & Support**

- a. Provide personalized, unique, “Market Leading” End User / Desktop Service & Support to non-technical user base of over 2,000 staff, supported sub-Providers, and Community Partners across 170+ locations in 20 States, with the potential that each location requires a different type of support (assets owned and managed by Eckerd, assets not owned but managed by Eckerd, supported users working off of Funder provided and/or managed assets, on both Eckerd and non-Eckerd managed networks) utilizing both vendor and Eckerd provided software solutions
- b. U.S. based Service & Support
- c. Dedicated, personalized ACD Phone line, ITSupport email address and customer friendly Support Portal
- d. Security access measures and safeguards, including user controls, administrative access and maintenance of sensitive client data such as network and administrative passwords
- e. Requisite support for Eckerd’s SaaS solutions
- f. Develop & maintain Support Operating Procedures for Customer’s 3<sup>rd</sup>-party, in-house developed, and other requisite applications
  - i. Provide support for same
- g. Support for staff remote access solutions (Remote Desktop Services, FortiClient)

- h. Define Onsite Support process vs Remote Support process
- i. Remove barriers to providing timely and quality support due to geographic differences between Support and Customer and when remote support cannot be accomplished timely or effectively
- j. Improve customer management process and end-user experience by identifying and utilizing self-serve options, simplifying applications access, automating customer notifications, and offering a mobile friendly platform, as applicable to the solutions and applications utilized across the Enterprise
- k. Details on what comprises a MAC (move, add change)
- l. Defined process for MAC's (moves, adds, changes) to include thresholds or limitations on same, as included in ITSM Managed Services fee and specific to end-user computing devices as well as Servers and enterprise (non-networking) equipment
- m. Enhance workforce and task management utilizing automation via scripting, batching, use of AI, etc.
- n. Enhance Help Desk management systems to automate task assignment and achievement and monitor performance with real-time tracking and reporting
- o. Enhance the ability to maintain Mission Critical applications support for both internal and funder provided (external) applications access across multiple remote access technologies and web browsers
- p. Details regarding customer service and soft skills training, provided by vendor to the ServiceDesk staff
- q. Describe typical annual turnover rate for vendor's Service Desk staff over last 3 years
- r. Process for ensuring that vendor's Service Desk is aware of and knowledgeable enough to be respectful of a diverse workforce and work culture
- s. Process for continuously monitoring, reviewing and maintaining Customer documentation updated current and accurate
- t. Details on any limitations that may be imposed on the number of calls, users supported, time limits, assets provisioned, imaged, deployed, etc. for a given period (hour, day, month, year, etc.) (information on # of Tickets, Incidents, Service Requests, Procurement and Reallocation of Asset requests contained in Attachment D)
  - i. Details on additional fees above average instances of any of the previously identified items
- u. Clearly define Incident, Request and Project
- v. Software licensing control (Client OS, Server OS, Virtual OS, Virtualization, Productivity, IT Management)– Maintain current inventory of software licensing and inform/recommend to Eckerd 90 days prior to renewal or requirement to purchase additional licensing

## **2. Physical and Virtual Server Infrastructure:**

- a. Comprehensive solution to ensure that all physical servers, Hosts and VM's are inventoried, managed, maintained and evaluated to ensure:
  - i. Operating Systems are maintained at never more than (2) versions from most current vendor platform, as appropriate / applicable
  - ii. Security update & patching process is defined, implemented and managed in accordance with (IAW) Industry Standard best Practice
  - iii. Hosted applications are monitored and maintained updated to within (1) major version of most current vendor provided platform, as appropriate / applicable
- b. Minimize Mission and Business Critical Server downtime
- c. Effective management and maintenance of AD and GPO to streamline and effectively manage the Enterprise
- d. Monitoring, management and support of CoLo Data Center Hosting Services
  - i. Virtual Technologies



- ii. Hosting, provisioning and management of Virtual Systems
- iii. Physical to Virtual migration services to address replacing on premises EOL/EOS solutions as needed
- e. Azure Cloud Database (DB) Solution Management, Maintenance, Tuning & Support
- f. Monitor, manage and maintain Enterprise and local storage arrays, SAN's, NAS's and solutions such as Nimble and Data Domain
- g. Reduce CapX and OpX costs of existing solutions, through proactive solutions monitoring, administration, management and growth planning
- h. Define the Project Management process
- i. Define the Change Management process

### **3. Technology and End-User Asset Procurement, Management and Inventory Management & Reporting**

- a. End User Device Management & Maintenance
  - i. Imaging, Profiling, Configuration and Deployment
    - 1. Provide a comprehensive solution that meets the evolving needs of asset imaging, profiling, reallocation / reassignment and retirement
    - 2. Process for evaluating, managing and maintaining all Customer asset images current and up to date
    - 3. Limitations on quantity of devices that can be imaged on a daily, weekly, monthly Semi-annual and Annual basis and as applicable to inclusion of the proposed Managed Services Fee's
  - ii. Minimize the impact of downtime, ideally "zero downtime", to the Customer created when laptops must be returned to IT Depot for repair, leaving staff without a functional technology asset
  - iii. Dedicated Vendor asset provisioning team separate from Infrastructure Engineers and Support Team members
  - iv. Break-fix
    - 1. Provide, manage, and support our current, or an appropriate alternative Break-fix model to minimize inconvenience to Customer that is created when assets must be returned to Depot for mainstream (keyboard replacement, battery replacement) break-fix and troubleshooting (for devices not covered under current 4-year NBD onsite support provided by our PC Vendor-Partner) of laptops
- b. Procurement
  - i. Implement and maintain a proactive technology asset procurement process that meets Statutory and Contractual requirements
  - ii. Provide and support a "Market Leading" Inventory, Depot Management and Procurement process capable of supporting multiple separate inventories, new and used, as well as Asset Disposition tracking and compliance, to include tracking ability by program and asset ownership (funder).
  - iii. Work with asset providers / partners and manage the procurement process to ensure availability of "standard" assets, with cost (alignment with budget) and ready availability as primary factors
- c. Reporting
  - i. Provide and support a mandatory, comprehensive, real-time, asset Inventory Reporting capability that is capable of meeting requirements of multiple funder report formats, in Real-Time

### **4. Vendor Management**

- a. Enhance interoperability between existing Vendor-Partners (for example Dell, Acuity, NTG, Valhalla, Windstream TelAdvocate, or others) to improve overall IT Service Delivery, operational capacity and Customer Support & Satisfaction
- b. Establish, manage and adhere to SOPs that clearly define management of vendor-partner relationships to ensure compliance with all partner organization SLA's.

#### 5. Operational Readiness responsibilities

- a. Identify and implement a comprehensive ITSM Managed Services solution that will ensure that the outsourced "IT Department" completely understands our diverse user /customer base, operational requirements and environments, uniqueness and constraints specific to different functional areas & programs and how continuity of this understanding will be maintained through all situations (changes in IT staff, after-hours support, vendor restructuring /reorganization) to maintain agreed upon SLA's & Performance Metric Targets
  - i. Define any dedicated Support Staff, Engineering, or other resources as part of Vendor proposed IT Managed Services proposal
- b. Capability to "pivot" on our timeline, as needs and situations warrant, to support a very dynamic and fluid Operating environment, Program startups, Program transitions and Program closures, in short notice (< 2 weeks) situations
- c. Demonstrate a thorough understanding of the concept of a **Fully and Completely Outsourced IT Department** and identify any barriers that would preclude vendor from providing all requisite services to meet this need. Clearly define what services are not included in this concept and would be considered outside the scope of proposed ITSM Managed Services
- d. DR & Business Continuity (BC) Processes
  - i. Process for testing and validating Disaster Recovery (DR) capability and Business Continuity (BC)
  - ii. Enhance DR and BC solutions and processes to ensure that access to ALL Business and Mission Critical data and applications are available, "anytime, from anywhere", 24/7/365 Data Management to include Backup, Archival & Storage Management
  - iii. Describe your Business Continuity Plan to ensure that our staff will continue to be supported without interruption and 24/7/365
- e. Enhance the ability to manage and maintain current data backup and archival solutions to ensure compliance with State, Statutory and Contractually mandated archival requirements
- f. Process for testing and evaluating ability to recover archived data to ensure compliance with State, Statutory and Contractually mandated archival requirements
- g. Describe the onboarding process for a "new" program location, regardless of location
- h. Describe the offboarding process for a program closure, regardless of location
- i. Details on how Vendor maintains staff's proficiency with new and emerging technologies
- j. Details on whether Vendor organization is SOC 2 certified and audited
- k. IT Budget, Strategic Planning Services & Execution Plans
  - i. Development & management of multi (3) year IT Strategic and Execution Plans
  - ii. Manage Annual Capital (CapX) and Operating cost (OpX) budgeting, to align with multi-year Strategic Plan
  - iii. Onsite / Local Quarterly Business Reviews
  - iv. Policy review and development of Risk Management, Technology and Systems Plan, and IT Policy
- l. Governance
- m. Quarterly Account True-ups

## **6. Performance, Analytics and Monitoring**

- a. Provide a Robust ITSM Reporting Toolset capable of:
  - i. Real time visibility of overall MSP performance (tickets, assets, projects, alerts, etc.) using Industry established Service Level Targets and Industry Specific KPI's
  - ii. Real Time Incident Management reporting
  - iii. Real Time and monthly CSAT monitoring
  - iv. Real Time 1<sup>st</sup> Call Resolution Rate / 1<sup>st</sup> Contact Resolution Rate, Average Resolution Time, # of Active/Open & Closed Incidents & Requests, Escalated Incidents, Self-Service Incidents, Average Hold Time, # Assets Deployed daily, weekly, monthly
  - v. Call Metrics daily, weekly, monthly
  - vi. Help Desk efficiency
  - vii. Help Desk productivity
  - viii. Define any additional Vendor metrics utilized in determining and managing ITSM Managed Services performance
- b. Define the referenced reporting Toolset

## **IV. Evaluation and Selection Methodology**

All responsive proposals will be reviewed, and recommendations will be made to the CIO for further evaluation.

Evaluation of proposals leading to a short list of vendors will be based primarily on the Vendor's written responses to the information requested in this ITN. Any information a Vendor deems essential to the evaluation of the services offered, for which no provision is made in the ITN, should be clearly stated in the proposal. Eckerd reserves the right to request additional information or clarification from Vendors at any given time in the process, Vendors should not assume that they will be allowed to amplify or modify their initial written proposal. The initial response must be a clear and easy to understand explanation of the products, services, benefits, and prices offered and should include information as to how all the scope of service addressed herein will be met.

The final recommendation(s) will be based on evaluation of the proposals, ranking of the proposals, short list and final negotiations including the Best and Final Offer (BAFO). The Evaluation Criteria, Specialized Experience and Technical Competence, Demonstrated ability to meet required Scope of Services, Pricing Methodology, Staff Qualifications and Short List Presentations, will be utilized to facilitate the ranking or scoring the proposer's proposals.

The ITN will be evaluated by the following three (3) steps:

### **Step 1 – Evaluate and Rank Proposers**

Invite shortlisted proposers to Presentation/Interviews and establish a Short List of Vendors for Negotiations; Step 1 in the ITN process has the following three areas of evaluation and ranking:

- Evaluate responsive proposals, rank them and recommend shortlist
- Invite shortlisted vendors to provide Presentation/Interviews to the Evaluation Committee; details on presentations will be provided to those extended an invite to present
- Presentations will be scored using the Weighted Scoring Criteria Matrix in Attachment E
- Complete evaluation and invite proposers to negotiations.

## **Step 2 – Negotiation with Short List Vendors**

Proposers that have been selected for negotiations will be interviewed focusing on the following areas:

- Resolving minor differences and editing errors
- Clarifying necessary details and responsibilities
- Emphasizing important issues and points
- Receiving assurances from Vendors regarding key points
- Obtaining the highest and best total value agreement

## **Step 3 – Recommendation to Negotiate**

“Best and Final Offer” (BAFO) or Recommendation to Negotiate with the Highest Ranked proposers:

Step three in the ITN process will allow for proposers that have been invited to negotiations to submit a “Best and Final Offer” (BAFO). A BAFO should include the best offer provided by any of the proposers after all negotiations have been exhausted. The Negotiation’s period shall be dictated by Eckerd and each proposer will be notified when to submit their BAFO. Eckerd reserves the right and may extend the BAFO period and allow vendors to clarify and/or amend the BAFO based on negotiated concessions or other agreed service levels. After all BAFO’s have been evaluated, select Vendors will be notified.

## **V. Public Records Access**

The Vendor agrees that any and all materials produced, prepared, provided, etc. for, and in response to, this ITN and actual services may be subject to public records requests in each state that Eckerd operates.

## **VI. Confidential, Proprietary or Trade Secret Information**

It is the vendor’s responsibility to identify any portion of the documents, data or records submitted in response to this ITN to be confidential, proprietary, trade secret or otherwise not subject to public disclosure. Vendor must mark the document as “Confidential” and briefly describe in writing the grounds for claiming exemption from the public records law. It is the Respondent’s responsibility to assert that the information in question is exempt from public disclosure. The Respondent shall be responsible for defending its determination that said portion of any documents, data or records submitted in response to this ITN are confidential, proprietary, trade secret or otherwise not subject to public disclosure.

By submitting a response, the respondent agrees to protect, defend, and indemnify Eckerd for any and all claims arising from or relating to the respondent’s determination that any portions of its response are confidential, proprietary, trade secret, or otherwise not subject to disclosure.