

SER-Jobs for Progress National, Inc.®

Cultivating America's Greatest Resource: People™

100 East Royal Lane Suite 130 • Irving, Texas 75039

Request for Proposal Managed Information Technology Services for Period of: July 16, 2017- June 30, 2020

Released: May 26, 2017

Inquiries and proposals should be directed to:

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Founded by the American GI Forum and the League of United Latin American Citizens, SER and SER - Jobs for Progress are Registered Service Marks of SER-Jobs for Progress National, Inc., a Texas non-profit corporation under Section 501(c)3 of the Internal Revenue Code. EOE-M/F/H/V

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Section 1 - General Information

A. Purpose of this Request for Proposal (RFP)

SER-Jobs for Progress National, Inc. (SER) is presently seeking competitive bids from vendors able to provide MANAGED INFORMATION TECHNOLOGY SERVICES. The winning vendor will provide hardware, network, and software support, helpdesk, backup and recovery, remote access and on-site support, email maintenance and support, data security, and disaster recovery.

The winning vendor is also expected to assist SER-National IT Management with long-term planning to keep systems current and functional in the most cost-effective manner possible. The vendor will also work to manage and prioritize work requests from various departments.

The overall goal of this RFP is to procure long-term, comprehensive, reliable, timely, and proactive IT management and support that will promote the mission of SER-Jobs for Progress National, Inc. in serving its constituents.

B. Who May Respond

Vendors providing Information Technology Consulting, Hosting, and Support services may apply.

C. Services Solicited in this RFP

Comprehensive managed infrastructure and network services to include, but are not exclusive:

- On-Site Support
- Help Desk Support
- After Hours Support
- Response Time/Problem Resolution Time
- Travel Time
- Training
- Regular In-Person Business Review
- Regular reporting on system health in business terms
- Response to major system problems or outages

Office Locations (for On-Site and Offsite Support):

Texas – Irving (Home Office), Fort Worth, Beaumont, Houston
Colorado – Fort Collins, Lakewood, Durango, Grand Junction, Trinidad
Wisconsin – Milwaukee, Fond du Lac, Monona, Rheinland, Spooner, Waukesha
Kansas – Chanute, Hays, Dodge City, Topeka, Wichita, Kansas City
Missouri – St. Joseph, Columbia
DC – Washington, DC

Maintenance and Service Requirements

Please provide details in your proposal on how your proposal meets or does not meet each item in the above sections; and answer to any questions included above. Please organize

your response by section and answer every point in each section.

D. Funding

Any contract awarded as a result of this RFP is contingent upon available Federal funding at currently existing levels. SER may unilaterally terminate a contract in the event that funding from Federal, State, or other resources becomes no longer available. If funding is limited in any way, this contract is subject to renegotiation under the new funding limitations and conditions. Such action is effective upon receipt of written notification from SER.

E. Description of SER

SER-Jobs for Progress National, Inc., is a private, 501(c)3 nonprofit corporation, which receives and administers Federal funds to provide employment, training, and support services to eligible economically disadvantaged individuals and dislocated workers.

SER is a national network of employment and training organizations that formulates and advocates initiatives that result in the increased development and utilization of America's human resources, with special emphasis on the needs of Hispanics, in the areas of education, training, employment, business and economic opportunity.

SER National aims to develop the employment and training capabilities of the SER network through the provision of technical assistance, research and planning, program and policy development, and fundraising.

Founded in 1964, SER operates with a network of 42 affiliates comprised of 220 training centers distributed in 19 states, Puerto Rico and the District of Columbia. SER is governed by a 20-member Board of Directors composed of representatives of business, industry, community-based organizations, economic development agencies, and educational entities. The primary responsibility of the SER board is to provide policy and program guidance, and to exercise independent oversight of program activities.

F. Governing Laws

Programs and activities solicited in this RFP are governed by all applicable Federal and State rules and regulations, including, but not limited to, those specifically governing each program operated by SER.

G. Method of Procurement & Type of Contract

All goods and services solicited under this RFP shall be procured by the competitive negotiation method. SER's intent is to execute a Cost-Reimbursement contract with the successful respondent.

H. Eligible Respondent and Competency

SER is prohibited from awarding funds to any party debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs in accordance with the Department of Labor regulation at 29 CFR Part 98. Any interested and qualified individual, organization, or company may submit a proposal. Respondents shall demonstrate the necessary technical skills and other resources to deliver the solicited goods and services.

I. Period of Performance

The contract negotiated as a result of this solicitation may commence on or after July 16, 2017. This first contract period is a 12 month contract, from July 16, 2017 to June 30, 2018. After that, SER will have the option to renew the contract in one year periods for up to two (2) additional years dependent on performance. The contract period may be varied by SER as necessary in compliance with State and Federal regulations. Additionally, the term of the contract shall be contingent upon the continuation of SER's contract for the operations and resulting funding of the programs. SER may exercise a Month-to-Month contract during transition period.

J. Response Deadline

The response deadline for this RFP is due at 12:00pm on June 26, 2017. Proposals, whether mailed or personally delivered, must be officially received at 100 East Royal Lane Suite 130, Irving, TX 75039 by this deadline with three (3) original proposals and one electronic copy delivered on a flash drive. Official receipt of proposals will be by entry on the SER log of proposals received.

Respondents who mail a proposal should use Registered mail with return receipt to verify delivery. Late proposals will be disqualified regardless of circumstances or method of delivery. Additions or deletions to the proposals must be submitted and included in the proposal on or before the deadline. Prior to the response deadline, withdrawal of a proposal is allowable in person with proper authorization. All proposals become the property of SER.

K. Bidders Questions and Technical Assistance

Bidders may submit questions via e-mail to Mr. Charles Laird at claird@ser-national.org. Due date for submitting questions is June 13, 2017. Formal responses to the questions will be provided to the bidders and will be posted on the SER-National website by June 16, 2017. This will be the only opportunity to ask specific questions concerning this solicitation. Staff, board members, and audit committee members are prohibited from addressing any inquiries outside the e-mail process.

L. Governing Provisions and Limitations

The purpose of this RFP is to ensure maximum, open, and free competition in the solicitation of and procurement of the goods and services described above. This RFP is not to be considered as a purchase agreement or contract or as a commitment of any kind; nor does it obligate SER to award any contract or pay for costs incurred prior to the execution of a contract unless such costs are specifically authorized in writing by SER.

SER reserves the right to:

- Accept or reject any or all proposals received, or to cancel or reissue this RFP in part or its entirety;
- Award a contract for any goods and services in any quantity that SER determines, at its sole discretion, is in its best interest;
- Award a contract to other than the lowest cost/priced respondent;
- Reject any proposal that fails to confirm the essential requirements of this RFP;
- Contact any individual or entity listed in the proposal or otherwise known to SER, who may have knowledge of the respondent's experience, performance, and qualifications; and

- Request additional information from any and all respondents.

Respondents shall not, under penalty of law, offer to provide any gratuities, favors, or anything of monetary value to any officer, member, employee, or agent of SER for the purpose of having an influencing effect toward their own proposal or any other proposal submitted hereunder. In addition, no employee, officer, or agent of SER shall participate in the selection, award of administration of a contract supported by Federal funds, if a conflict of interest, real or apparent, would be involved.

Respondents shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause a proposal to be rejected. This does not preclude joint ventures or subcontracts.

The contents of a successful proposal may become a contractual obligation if selected for award. Failure of the respondent to accept this obligation may result in cancellation of the award.

No pleas of error or mistake shall be available to successful respondent as a basis of release of proposed services at stated price/cost. Any damages accruing to SER as a result of the respondent's failure to deliver the proposed goods and services may be recovered from the respondent.

A contract with the selected respondent may be withheld, at SER's sole discretion, if issues or questions of compliance are not satisfactorily resolved. Award of goods and services may be withdrawn if resolution is not satisfactory to SER.

SER reserves the rights to clarify, explain, or verify any aspect of a response to this RFP, and to require the submission of any price, technical, or other revision to the RFP that results from negotiations conducted.

M. Selection Process

The proposal selection process includes the evaluation, rating, and ranking of the proposals by SER staff. After evaluation, recommendation(s) for selection to negotiate a contract will be made to the President and CEO. All respondents to this RFP shall be notified of their status by mail.

In the selection and award of goods or services procured under this RFP, SER shall ensure:

- Awards shall be made only to responsible respondents who have demonstrated ability to perform based upon delivering comparable or related services;
- Staff and organization qualifications, including a satisfactory record of past performance and experience;
- All proposals considered are received on time and are responsive to the specifications of the RFP; and
- Positive efforts are made to utilize Historically Underutilized Business' (HUB's) in the provisions of program services.

Top three companies may be requested to make an oral presentation or demo to a SER review committee.

N. Proposal Evaluation Criteria

Only proposals submitted on a timely basis will be evaluated, using the following criteria and point system.

- *Demonstrated Effectiveness - 60 points*
 - *Comprehensiveness of Services Provided*
 - *Overall capabilities of the vendor to meet service levels requested in this RFP*
 - *Non-Profit Experience*
 - *Vendor's experience in providing services to the Non-Profit sector*
 - *Service Enhancements*
 - *Vendor's effort to understand SER's requirements, and the creativity the vendor shows in introducing new technologies and efficiencies to improve our current practices and procedures.*
- *Reasonableness of Cost - 25 points. The reasonableness of cost for services proposed.*
- *Other – 15 points*
 - *Any other factors that we believe are in SER's best interest to consider which were not previously described.*
- Total points – 100
- *HUB – 5 additional points. See Section 2, Paragraph B for definition of HUB.*

O. Scope of Work

The company awarded the RFP will work with the Information Technology Administrator to provide a seamlessly integrated system of support for all IT Services.

Include a detailed description of each major type of works being requested of the vendor. All information that is provided will be held in the strictest of confidence. The proposal should address each of the following:

OVERALL

- Evidence of understanding of working within budget constraints
- Evidence of ability to deliver on time and on budget within a Non-Profit environment

MANAGED SERVICES

- Describe your Service Level Agreements (SLAs)
- Although our normal business hours are 830a to 530pm, Monday through Friday, we operate offices throughout the United States. Describe the support model for providing support for extended hours of operation.
- Emergency Support options
- Is your support model all-inclusive? If not, what is not included?
- Your proposal should address the following:
 - Server Support
 - Network Support
 - Management of Cloud Services
 - Desktop and Laptop Support
 - Help Desk Support
 - Is it limited to a quota of calls?

- What are the Help Desk hours? If they do not cover all of our hours of operations, please describe what coverage will be provided for those hours outside of your help desk hours.
- Who can call the Help Desk?
- Will the Help Desk staff be local/on-site? If not, where will they be located?
- What is your average response time and problem resolution time?
- Will the Help Desk staff be employees of the support company or sub-contracted?
- Will the Help Desk be full time?
- What is the skill/certification level of first-level help desk staff?
- What happens if the help desk cannot resolve the problem?
- Other User Support
- Internet Service Providers
- Electronic Mail
- Security of Equipment and Data
- Security Plan for Remote Processing
- Support for IT Operational Recovery Plan/Disaster Recovery/Business Continuity
- Reporting to Management
- Assistance with development of IT policies and procedures
- Who is responsible for managing, monitoring, and responding to systems?
- Is training provided? Will it be part of the proposal or billed separately? If separately, please provide cost information and what kind of training you provide.
- In what instances would SER incur additional costs?
- What kind of insurance coverage does the company have? Are you willing to name SER as an additional insured? Please include a copy of your current certificate of insurance.
- Are your staff bonded? Up to what amount?
- Your plan for ensuring compliance with information security standards. Also, describe your experience working with HIPAA, FERPA, and other information security standards compliance environments.
- Explain your process for handling special requests or projects from your clients.
- Describe your experience working with non-profit agencies.
- What are the terms for canceling the support relationship? How much notice will be required?
- Your company's onboarding plan?
- What is included in your proposal?
- What is not included in your proposal?
- What are your key differentiators?

P. Respondent Inquiry and Appeal Process

SER is the responsible authority for handling complaints or protests regarding the procurement and proposal selection process. No protest shall be accepted by the grantor (state or federal) until all administrative remedies at the grantee (SER) level have been exhausted. This includes, but is not limited to: disputes, claims, protests of award, or non-selection for award, source evaluation, or other matters of a contractual or procurement nature. If any respondent disagrees with the procurement and/or selection process, a written appeal, stating the reason for the appeal, must be filed with the President of SER within seven calendar days from the date of the award notification.

Q. Payment Provisions

Payment on invoices to SER will be made within the terms and processes usual and customary in the industry.

R. Equal Opportunity

It is the policy of SER to encourage and support equal opportunity in the purchase of goods and services. No person shall, on the grounds of race, color, religion, sex, handicap, national origin, age, citizenship, sexual orientation, marital status, political affiliation, or belief, be discriminated against under any program or activity receiving Federal funds.

Participation shall be open to citizens and nationals of the United States, lawfully admitted resident aliens, and lawfully admitted refugees and parolees.

In compliance with the Department of Labor regulations implementing Section 504 of the Rehabilitation Act of 1973, as amended, no qualified disabled individual shall be discriminated against in the admission or access to, or treatment, or employment in any program or activity.

Section 2 - Instructions for Submitting Proposal

A. Proposal Responses

All proposals must include the following information in the order stated:

1. The proposal cover sheet must identify a primary contact person, as well as the signatory authority, with the legal authority to enter into legal agreements on behalf of the proposing organization.
2. The complete proposal will include:
 - Statement of Respondent's understanding of this RFP, its requirements, and services to be performed;
 - A statement from the authorized signatory that the proposal is valid for 90 days after the submittal deadline; and
 - A positive statement of commitment to perform the services within the period specified.
 - Complete, detailed response to Section 1, Item "C" above. The response should be organized by section, and within each section a response to every bullet should be provided.
 - A complete budget for this contract consisting of detailed fee information (including early termination fees and terms), updates, and maintenance. Costs should be inclusive of tax reporting, and other services identified in Section 1, Item "C" of this RFP.
 - Costs for additional services on a per-transaction or hourly basis.
 - Profile of the Respondent Firm including the location of the office(s) from which this work is to be performed.
 - A copy of your current HUB certification, if applicable.
 - Suspension/Debarment Certification (Attachment "B")
 - Drug-Free Workplace Certification (Attachment "C")
 - Certification of Bidder (Attachment "D")

- Liability coverage of firm (submit proof of insurance).
- Certificate regarding conflict of interest (attachment "E")
- Proof of Bonding/Certification of Insurance

B. Historically Underutilized Business (HUB)

A **HUB** is defined by the Texas Government Code §2161.001 "a corporation, sole proprietorship, partnership, or joint venture formed for the purpose of making a profit in which at least 51 % of all classes of the shares of stock or other equitable securities are owned by one or more persons who are socially disadvantaged because of their identification as a member of the following groups: Black American, Asian Pacific American, Hispanic American, Native American, and Woman."

Five points will be awarded to the responsive proposals providing current documentation of certification from the Texas Comptroller of PublicAccounts.

C. Format

Proposals must be typed and submitted on 8 1/2" x 11" paper in accordance with the instructions in this request. Proposal will have at least 1" margins and use a commonly used font no smaller than 10 points. Fancy or bulky binding, colored displays, and promotional material are discouraged and will not improve the evaluation score. Emphasis must be placed on addressing all the requirements of this **RFP** in a clear, complete, and concise manner.

Proposal pages shall be sequentially numbered and total not more than eight (8) pages. The original and each of the copies shall be noted as such on the proposal cover sheet.

D. Number of Copies

Three (3) complete original and one electronic copy (via flash drive) must be submitted by the deadline. All documents submitted must be legible and complete. SER is not responsible for copying incomplete proposals.

E. Proposal Labeling and Submission

Proposals must be submitted in a sealed envelope or package and externally labeled as follows: SER-Jobs for Progress National, Inc., Attn: Keith A. Overton, CPA, CFO 100 East RoyalLane, Suite 130; Irving, Texas 75939.

Dated Material: Managed Information Technology Services RFP is due at 12:00pm on June 26, 2017.

F. Response Forms

Proposal Cover Sheet
 Proposal Narrative (Addressing Section C)
 Proof of Insurance
 Documentation of Bonded Staff
 Detail Budget and Narrative, including Fee Schedule
 Suspension/Debarment Certifications (Attachment B)
 Drug-Free Certification (Attachment C)

Certification of Bidder (Attachment D)
Certificate Regarding Conflict of Interest (Attachment E)

SER-Jobs for Progress National, Inc.
RFP Dated Issued, September 9, 2016; Multifunction Copiers and
Managed Print Services

PROPOSAL COVER SHEET

Legal Name of Organization: _____

Authorized Signer: _____

Title: _____

Mailing Address: _____

Physical Address (If Different): _____

Telephone Number: _____

FAX Number: _____

Contact Person Name: _____

Contact Person Title: _____

Entity Type: Corporation Sole Proprietor

Partnership Other

Is Responder a HUB? Yes No

Certifying Agency: _____

**Attachment B - Certification Regarding Debarment Suspension,
Ineligibility, and Voluntary Exclusion Lower Tier Covered Transactions**

This Certification is required by regulations implementing Executive Order 12549, Debarment and Suspension, 20 CFR Part 98. The regulations were published as Part VII of the May 26, 1988 Federal Register (pages 1916019211).

1. The prospective recipients of Federal assistance funds certify, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

2. Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participants shall attach an explanation to this proposal.

Name of Authorized Representative

Title

Signature

Date

Attachment C - Certification Regarding Drug-Free Workplace

- A. The grantee certifies that it will or will continue to provide a drug-free workplaceby:
1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violation of such prohibition.
 2. Establishing an outgoing drug-free awareness program to inform employees about
 - a. The dangers of drug abuse in the workplace;
 - b. The grantee's policy of maintaining a drug-free workplace;
 - c. Any available drug counseling, rehabilitation, and employee assistance programs; and
 - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.
 3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph 1.
 4. Notifying the employee in the statement required by paragraph 1 that, as a condition of employment under the grant, the employee will:
 - a. Abide by the terms of this statement;
 - b. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar daysafter such violation.
 5. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph 4b from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position, title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification numbers(s) of each affected grant.
 6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4b, with respect to any employee who is so convicted:
 - a. Taking appropriate personnel action against such an employee, up to and including termination consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
 - b. Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency.

7. Making good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1, 2, 3, 4, 5, and 6.

B. The grantee may insert in the space provided below the site(s) for the performance of work down in connection with the specific grant:

Place of Performance: Check () if there are workplaces on file that are not identified here.
() Not Applicable.

Name of Applicant Organization:

Name & Title of Authorized Signatory:

Signature: _____ Date: _____

Attachment D - Certification of Bidder

1. The individual signing certifies that he/she is authorized to contract on behalf of the Respondent.
2. The individual signing certifies that the Respondent is not involved in any agreement to pay money or other consideration for the execution of this agreement, other than to an employee of the Respondent.
3. The individual signing certifies that the prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition.
4. The individual signing certifies that the prices quoted in this proposal have not been knowingly disclosed by the Respondent prior to an award to any other Respondent or potential Respondent.
5. The individual signing certifies that there has been no attempt by the Respondent to discourage any potential Respondent from submitting a proposal.
6. The individual signing certifies that he/she has read and understands all of the information in this Request for Proposal.

I, _____ am the _____ of the
(Type Name of Signatory Authority) (Title)
Corporation, partnership, association, public agency, or other entity named as the
respondent herein and that I am legally authorized to sign this proposal and submit it to
SER Jobs for Progress National, Inc. on behalf of said organization by the authority of its
governing body. I also certify that I have read and understand the "Governing Provisions
and Limitations" sections presented in this RFP and will comply with the terms, thereof.

Respondent:

Attest:

(Respondent Signature) / Date

(Collateral Signature) / Date

(Typed Name)

(Typed Name)

(Typed Title)

(Typed Title)

Subscribed and sworn before me this _____ day of _____, in
_____ County, State of _____.

(SEAL)

Notary Public in and for _____ County, State of _____

Date Commission Expires: _____

**ATTACHMENT E
CERTIFICATE REGARDING CONFLICT OF INTEREST**

By signature of this Certificate, Respondent covenants and affirms that:

1. No manager, employee or paid consultant of the Respondent is a member of the Policy Board, the President, or an employee of SER;
2. No manager or paid consultant of the Respondent is married to a member of the Policy Board, the President, or an employee of SER;
3. No member of the Policy Board, the President or an employee of SER owns or controls more than a 10 percent share in the Respondent's organization;
4. No spouse of a member of the Policy Board, President, or employee of SER receives compensation from Respondent for lobbying activities as defined in Chapter 305 of the Texas Government Code;
5. Respondent has disclosed within the proposal response any interest, fact or circumstance, which does or may present a potential. conflict of interest;
6. Should Respondent fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Respondent shall not be entitled to the recovery of any costs or expenses incurred in relations to any contract with SER and shall immediately refund to SER any fees or expenses that may have been paid under the contact and shall further be liable for any others costs incurred or damages sustained by SER relating to that contract.

Name of Individual or Organization submitting application.

Name and Title of Authorized Signatory.

Signature

Date

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