



Northeast Energy Efficiency Partnerships, Inc. (NEEP)

Managed Service Provider  
Request for Proposal  
(RFP MSP2021)

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## **1. Introduction**

Northeast Energy Efficiency Partnerships, Inc. (NEEP) is pleased to invite you to respond to this Request for Proposal (RFP) for Managed IT Services. The intention of this RFP is to solicit responses and formal proposals from qualified Managed IT Services Providers (MSPs) and select an organization to provide IT services to NEEP.

### ***1.1 About Northeast Energy Efficiency Partnerships, Inc.***

NEEP was founded in 1996 as a non-profit accelerating energy efficiency in the Northeast and Mid-Atlantic states. Today, it is one of six Regional Energy Efficiency Organizations (REEOs) funded, in part, by US Department of Energy to support state efficiency policies and programs. With a budget of about \$4 million, it is also funded by other federal, state, and private entities. More detailed information can be found at [www.neep.org](http://www.neep.org).

NEEP has 24 full- and part-time employees, with 21 located in NEEP's main office in Lexington, Mass., and three working from remote locations in different states. All employees primarily use a laptop running Windows OS (Windows 10 and Windows 7), although several employees also have desktop computers in the Lexington office.

Currently, all NEEP employees are working remotely. All employees will continue to need the ability to effectively work remotely from home office locations as well as "on the road" in the future. NEEP employees are currently using Windows Server 2012 R2 Standard and/or SonicWall's SSL VPN NetExtender or Microsoft L2TP to gain remote access to NEEP's network.

NEEP currently uses Slack internally for messaging and video calls. Citrix GoToMeeting and/or Zoom is used for larger and public calls. Some employees use external webcams, others the cameras on their laptop. NEEP uses Microsoft Office 2013, and does not use any shared document management system. Later this year NEEP will be implementing NetSuite as its new, integrated cloud-based Enterprise Resource Planning (ERP) system, replacing its current Sage accounting system and Insightly CRM. NEEP also anticipates replacing GoToMeeting with Zoom for its meeting service this year.

### ***1.2 Purpose & Scope***

With this RFP, NEEP is requesting information about your company and the IT products and solutions you provide as outlined in the Service Requirements section. This information will be gathered from several different organizations and used to evaluate provider options for NEEP.

This RFP is issued solely for information and planning purposes. This document does not commit NEEP to contract for any service, supply, or subscription whatsoever. NEEP will not reimburse any information or administrative costs incurred as a result of participation in

response to the RFP. All costs associated with response will solely reside at the responding party's expense.

### **1.3 Confidentiality Statement**

All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to NEEP's Managed Service Provider selection effort, may be disclosed to another party or used for any other purpose without express written or verbal consent.

## **2. Environment Overview**

The information below outlines the general demographics of NEEP and our current technical environment.

**Office Location:** 81 Hartwell Avenue, Suite 220, Lexington, MA 02421

**Number of Employees:** 24 full- and part-time employees, with 21 located in Lexington, MA and one each in the states of New York, Pennsylvania, and North Carolina

### **Current Technical Environment:**

- **Core Hardware**
  - 3 Physical Servers
  - 8 Virtual Servers
  - 6 Switches
  - 1 Firewall
  - 1 Router
  - Verizon and Comcast equipment
  - 4 UPS's
- **Software Systems**
  - Exchange on premises
  - EOP (Exchange Online Protection) in cloud
  - Sage Accounting
  - AWS for two public projects (HELIX and ASHP)
  - Webserver, external contract for development, administration in house
  - Oracle NetSuite (NS) being implemented in 2021, cloud-based solution, replacing current Sage accounting software
- **Connectivity**
  - Verizon FiOS
  - Comcast
- **Remote Access / VPN**
  - 2 Remote desktop servers
  - 2 VPNs

- **Applications**
  - Office on desktops
  - Adobe creative cloud
  - ArcGIS
  - Slack
  - Go To Meeting (GTM) and Webinar (likely to be replaced with Zoom in 2021)
  - Insightly (likely to be replaced with NetSuite CRM in 2021)
  - Solstice for office conference rooms
- **Backups, Antivirus, and Remote Support Software**
  - Daily Backups
  - Remote support GoToAssist
  - Malwarebytes and Windows defender
- **Workstations and other Devices**
  - 30 Laptops
  - 5 Spare laptops
  - Telephone equipment, supporting phone system
  - 5 Solstice servers, conference rooms
  - 1 Projector in large conference room
  - 4 Display monitors, smaller conference rooms and kitchen with Solstice connection

### 3. Service Requirements

As part of this RFP, NEEP has requirements for the following services. We realize that not every MSP will be able to provide all the services listed below, but we encourage you to respond regardless.

- **Help Desk Support** – The MSP should offer superior 24x7x365 Help Desk support services utilizing industry best practice processes and procedures.
- **Server & Network System Monitoring** – The MSP must provide 24x7 monitoring of NEEP’s server & network system with proactive communication and escalation protocols based on the severity of any unscheduled outages.
- **Patch Management Services & Preventative Maintenance** – The MSP must provide management of critical security and system patches to all servers and systems on the network to ensure NEEP’s IT systems and resources are properly managed and maintained.
- **Business Continuity and Disaster Recovery** – The MSP must be able to support NEEP’s ability to recover based on the Recovery Time Objective (RTO) and Recovery Point Objective (RPO) agreed upon by organizational constituents. In addition, backup and redundancy should be used to support this need.
- **Remote Backup** – The MSP must execute a nightly backup plan for the critical servers, including a regularly-tested recovery process.
- **Email System Management** – NEEP requires the management and administration of NEEP’s email system for all users.

- **Antivirus, Antispam, and Antispyware Protection** – NEEP is looking for solutions to defend against security threats including phishing, malware, spam, viruses, and ransomware.
- **Onsite Support** – When needed, the MSP should have the ability to deploy onsite resources to assist in issues which cannot be resolved through remote access to in-house systems, having a regular scheduled in-house visit might be needed for regular maintenance and support.
- **Networking Support** – NEEP requires proactive management and monitoring of our switches, firewalls, routers, phone, Wi-Fi systems, and other networking equipment.
- **Security Systems Monitoring** – MSP must provide proactive monitoring and management of NEEP’s security systems, including firewalls, intrusion prevention, secure remote access, and any advanced security solutions MSP utilizes or suggests.
- **Vendor Management** – The MSP should be able to manage other vendors which may be contracted by NEEP and serve as the key point of contact unless escalated.
- **Warranty and Asset Inventory Management** – NEEP expects the MSP to maintain a hardware and asset inventory that includes Desktops, Laptops, Servers, Printers/Scanners, Fax Machines, and to notify NEEP of any potential service or warranty issues. The MSP must also assist with managing the lifecycle of NEEP’s devices and maintain an equipment inventory to ensure our systems are always functional and current.
- **Software Licensing Control** – The MSP must provide oversight of automatic renewal of software applications and maintenance of appropriate documentation.
- **Procurement Management** – The MSP must assist with the selection of commercially-rated equipment, order placement, order tracking, shipping, equipment returns, sourcing, and ordering of replacement parts.
- **PC Deployment** – The MSP must provide delivery and setup of machines onsite or to staff working remotely.
- **Desktop and Laptop Support** – The MSP must include their ability to support existing and future desktop and laptop hardware. This includes maintenance and repair, replacement for failed equipment, and the acquisition and provisioning for new equipment as needed.
- **Printers, Copiers, and Scanners** – The MSP must be able to support existing printers, copiers, and scanner-related network-printing issues.
- **Desktop Software Standardization and Software Licensing and Upgrades** – The MSP must have a process for identifying standardization and management of desktop images and ensuring that staff are using current products as well as current OS and browser versions.
- **Lifecycle Management of Hardware Units** – The MSP should have processes for end-of-life notification, replacement, and asset decommissioning/disposal.
- **Break Fixes and Installation** – The MSP should offer planned and on-call break/fix services, including emergency response to server issues.
- **Move, Add, Change (MAC)** – NEEP is looking for the MSP to help with any changes to the location, configuration of existing equipment or software, and installation of additional equipment or software as needed.
- **Mobile Device Support** – In addition to laptops and desktops, some staff use mobile phones and tablets. The MSP will need to support secure provisioning (and ongoing support of that provisioning) of any mobile device into the company network. In the event the device is lost, the corporate mail and contact data should be able to be easily wiped from the device while preserving individual’s personal information. A Mobile Device Management strategy and system recommendation should be considered and included in response to this RFP.
- **Reporting** – The MSP should provide relevant reporting not only based on their performance from a help desk perspective but also regarding system health, uptime, and

assist in keeping an accurate hardware inventory to inform ongoing planning of maintenance, warranties, and refresh schedules.

- **Technology Strategy Planning** – The MSP will work with current IT staff to develop a strategic technology plan. The plan will take advantage of new and existing technologies to produce a pragmatic and effective roadmap that enables the organization to fulfill its overall mandate, utilizing best-in-class software and tools.
- **Account Management** – The MSP must offer an internal escalation process in tandem with NEEP to ensure the ability to have multiple points of contact available if needed depending on the items or issue encountered.
- **Project Management** – The MSP should be able to offer project management and technical engineering resources to assist with technical projects as identified by the MSP or NEEP.
- **Solution Design** – The MSP must provide solution packages (e.g., hardware, software, licensing) and associated consolidation of data.
- **Service Levels** – The MSP should identify service-level agreements or objectives and report back on a regular basis to NEEP on their ability to meet these agreements or objectives.
- **IT Policy Review and Development** – The MSP should be able to assist in the development of customized policies related to the use of technology.
- **Hosting** – The MSP should offer services relative to hosting or co-location of equipment, either directly or through partners.
- **Onboarding and Offboarding Staff** – The MSP must have process and procedure in place to onboard or offboard team members in a timely and efficient manner.
- **Compliance** – The MSP must use systems that comply with published Payment Card Industry (PCI) Security Standards. In addition, the MSP should support rules and regulations as provided by relevant governing organizations as identified by regulatory or grant-based requirements.
- **Scalability** – The MSP must be able to offer a model where scaling up or down from a system and cost perspective is simple and nimble.
- **Multi-Factor Authentication (MFA)** – The MSP must be able to provide and manage a Multi-Factor Authentication (MFA) solution to provide an easy-to-use method to verify user identities at login, and to protect logins with multi-factor authentication.
- **End-User Security Awareness Training** – The MSP should offer Security Awareness Training to teach NEEP’s staff and employees about current threats, terms, standards, and compliance to help them avoid a security incident.
- **Vulnerability Testing** – The MSP should offer vulnerability tests, both internally and externally, to determine what flaws and potential threats exist from the outside, or perimeter, of NEEP’s business network.
- **Managed SOC-as-a-Service** – The MSP should offer a Security Operations Center, Managed SOC-as-a-Service, to monitor NEEP’s environment and ensure proactive detection and response to threats, intrusions, and attacks.
- **Special Projects** – In 2021, assist in the implementation of Oracle NetSuite ERP system; assess, recommend, and potentially assist in the implementation of new/different software tools for remote work; and other projects in the future as may be determined.

## **4. Response Process**

### ***4.1 Submission of Clarifying Questions***

At any time leading up to the response deadline, we encourage you to submit clarification questions regarding the RFP. Answers will be posted for or communicated to all vendors.

### ***4.2 Primary RFP Contact***

Please direct all inquiries regarding to this RFP to:

Laura De Angelo  
[ldangelo@NEEP.org](mailto:ldangelo@NEEP.org)  
Grants & Contracts Manager  
Northeast Energy Efficiency Partnerships, Inc.  
81 Hartwell Avenue  
Lexington, MA 02421  
O: 781-860-9177 ext. 124  
C: 617-610-3061

### ***4.3 Response Delivery Instructions***

NEEP requires responses to this RFP to be delivered in writing. You may attach documentation to support your answers, if necessary.

Please submit all responses via electronic delivery no later than April 28, 2021, 5:00 p.m. EDT to:

Robert M. McTighe  
Director of Finance & Administration  
[bmctighe@NEEP.org](mailto:bmctighe@NEEP.org)

with copy to:

Laura De Angelo  
Grants & Contracts Manager  
[ldangelo@neep.org](mailto:ldangelo@neep.org)

Any response received after the delivery date specified will not be considered without prior written or electronic approval.

Please provide responses to the questions directly in the attached forms (Attachment A and Attachment B), a proposal document, pricing breakdown, and a version of any master services agreement or other contract that would be utilized if chosen. Answers should be short and concise, and the entire response should be limited to no more than ten (10) pages.

## **5. Selection Criteria & Process**

### ***5.1 Selection Criteria***

NEEP will evaluate the responses based on multiple criteria and will select the best overall solution to fit its needs. NEEP is not obligated to select the lowest price bidder. All responses will be evaluated in the following areas:

- Completeness of solution
- Expertise and experience
- Demonstrated customer service quality and support
- Previous relevant experience
- Vendor strength and stability
- Account management
- Reporting capabilities
- Financial considerations

### ***5.2 Selection Process***

All responses will be evaluated as received and included in the following process:

- Review and scoring of the responses, as well as clarification of information as deemed necessary by the evaluation team.
- Identification of 2 - 3 final candidates to conduct in-depth review of capabilities, including interviews and presentations.
- Conducting of site visits and/or reference calls as deemed appropriate by the evaluation team.

### ***5.3 Finalist Presentations***

Our intention is to hold virtual presentations/demonstrations with one or more firms as indicated in the *Key Dates* table. The presentations will be held virtually and we will try to provide the finalist firms with as much advance notice as possible.

## 6. Key Dates

Below is a general timeline outlining the process steps with estimated dates for each step of the process. By participating in the RFP process, MSPs agree that they can adhere to the following general timeline and the meeting times they reserve through this process.

| Task                                    | Completion Date          |
|---|--------------------------|
| RFP Distributed to MSPs                 | 4/8/2021                 |
| Responses Due from MSPs                 | 4/28/2021, 5:00 p.m. EDT |
| Response Analysis / Finalists Selection | 5/14/2021                |
| Finalist Presentations                  | 5/19/2021 – 5/28/2021    |
| MSP Selection / Award Contract          | 6/10/2021                |
| MSP “Go Live”                           | 7/1/2021                 |

### ***Thank You***

NEEP looks forward to reviewing your response and would like to thank you in advance for your participation. The Managed Service Provider selection project is very important to our continued success and represents a major focus of effort for NEEP. We appreciate and value your input, expertise, and feedback.

# Attachment A

## RFP Response Form: Corporate Information

Please provide the following information about your company with short, concise answers, using “NA” for Not Applicable if appropriate. Respond directly in the table provided.

| <b>1.0 Company Profile</b> |   |  |
|----------------------------|---|--|
| <b>1.1</b>                 | Company Name  |  |
| <b>1.2</b>                 | Company Address   |  |
| <b>1.3</b>                 | Contact Information<br>(Party responsible for responding to this RFP) |  |
| <b>1.4</b>                 | Company Webpage   |  |
| <b>1.5</b>                 | Main Products / Services  |  |
| <b>1.6</b>                 | Main Market / Customers   |  |
| <b>1.7</b>                 | Number of Years in Business   |  |
| <b>1.8</b>                 | Company Location(s)   |  |
| <b>1.9</b>                 | Total Number of Employees for each 2018, 2019, and 2020               |  |
| <b>1.10</b>                | Number of Employees That Meet RFP’s “Onsite” Requirement              |  |
| <b>1.11</b>                | Number of Employees in Technical Support                              |  |
| <b>1.12</b>                | Subsidiaries, Affiliations, or Partnerships                           |  |
| <b>1.13</b>                | Average Number of Clients/Accounts for each 2018, 2019, and 2020      |  |

# Attachment B

## RFP Response Form: Questions

Please provide the following information about your company with short, concise answers, using “NA” for Not Applicable if appropriate. Respond directly in the table provided.

| <b>1.0 General</b> |  |
|--------------------|--|
| <b>1.1</b>         | <b>Q. What are the general types of organizations your clients represent?</b><br>A.  |
| <b>1.2</b>         | <b>Q. Why do you believe that you are a good fit with our organization?</b><br>A.  |
| <b>1.3</b>         | <b>Q. Do you conduct quarterly or semi-annual business reviews with your clients and what is the nature of those meetings?</b><br>A. |
| <b>1.4</b>         | <b>Q. How do you typically work with IT Management at clients who have staff members and ones that don't?</b><br>A.                  |
| <b>1.5</b>         | <b>Q. What do you feel your overall strengths and differentiators are?</b><br>A.   |
| <b>1.6</b>         | <b>Q. Do you serve clients with 24x7 requirements?</b><br>A.   |
| <b>1.7</b>         | <b>Q. What services do you offer besides the core services of a Managed Service Provider?</b><br>A.                                  |
| <b>1.8</b>         | <b>Q. What type of staff training or resources do you offer either during onboarding or ongoing?</b><br>A.                           |
| <b>1.9</b>         | <b>Q. What type of expertise can you provide in key technology areas with a proactive CTO vision?</b><br>A.                          |
| <b>1.10</b>        | <b>Q. What is your approach to transitioning office-based organizations to effective remote work?</b><br>A.                          |
| <b>1.11</b>        | <b>Q. What is your approach/process for monitoring evolving security threats and ensuring that clients are protected?</b><br>A.      |

| <b>2.0 Processes</b> |  |
|----------------------|--|
| 2.1                  | <p><b>Q. Do you use in-house or contracted resources for services?</b></p> <p>A.</p>   |
| 2.2                  | <p><b>Q. Describe your process for migrating NEEP to your organization. Detail your onboarding/implementation process and approach if you were selected.</b></p> <p>A.</p>   |
| 2.3                  | <p><b>Q. What NEEP resources would you require (i.e., information, data, staff resources, communication) during initial migration and on an ongoing basis?</b></p> <p>A.</p> |
| 2.4                  | <p><b>Q. Outline the methods by which clients can access you (i.e., online, by phone, etc.).</b></p> <p>A.</p>   |
| 2.5                  | <p><b>Q. Describe the escalation and account management process.</b></p> <p>A.</p>   |
| 2.6                  | <p><b>Q. Where is/are your support center(s) located?</b></p> <p>A.</p>  |
| 2.7                  | <p><b>Q. What processes, drills, or tests do you undergo for industry standards or disaster recovery?</b></p> <p>A.</p>  |
| 2.8                  | <p><b>Q. How do you notify users of maintenance windows or system outages?</b></p> <p>A.</p>   |
| 2.9                  | <p><b>Q. What types of diagrams would you typically create/maintain?</b></p> <p>A.</p>   |
| 2.10                 | <p><b>Q. What is your ability to support the security systems, phone systems, audio/visual systems?</b></p> <p>A.</p>  |

| <b>3.0 Technology</b> |  |
|-----------------------|--|
| 3.1                   | <p><b>Q. What types of monitoring agents would you use for end user devices?</b></p> <p>A.</p> |
| 3.2                   | <p><b>Q. Do you offer managed firewalls or other managed technology?</b></p> <p>A.</p>         |
| 3.3                   | <p><b>Q. Do you offer MDM or other mobile management technology?</b></p> <p>A.</p>             |

|     |  |
|-----|--|
| 3.4 | <b>Q. Do you offer a Security Information and Event Management (SIEM) or other security-based technology?</b>            |
|     | A.   |
| 3.5 | <b>Q. Do you have tools to provide system uptime metrics?</b>  |
|     | A.   |
| 3.6 | <b>Q. What tools do you use for network monitoring?</b>  |
|     | A.   |
| 3.7 | <b>Q. What tools do you use for system monitoring or general health level of end user devices?</b>                       |
|     | A.   |
| 3.8 | <b>Q. Do you offer or partner for laptop encryption?</b>   |
|     | A.   |
| 3.9 | <b>Q. If hosting/co-location is an option please describe details of option (i.e., services, vendor partners, etc.).</b> |
|     | A.   |

|                    |   |
|--------------------|---|
| <b>4.0 Support</b> |   |
| 4.1                | <b>Q. 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.</b>          |
|                    | A.  |
| 4.2                | <b>Q. Please provide details on your standard reporting capabilities.</b>   |
|                    | A.  |
| 4.3                | <b>Q. Describe any documentation, support, and training (e.g., user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from a technical and end user perspective.</b> |
|                    | A.  |
| 4.4                | <b>Q. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?</b>  |
|                    | A.  |
| 4.5                | <b>Q. NEEP's user base varies in its level of technical sophistication. Please describe your experience in successfully supporting users that may be remote and possess limited technical skills.</b>                                   |
|                    | A.  |

## **5.0 Pricing & Contracts**

|            |  |
|------------|--|
| <b>5.1</b> | <b>Please attach cost estimates and worksheets to support these estimates if applicable. Itemize non-recurring and recurring costs. Recurring costs should be quoted as per user per month costs. Other pricing models may be provided as an option.</b> |
| <b>5.2</b> | <b>Please attach a Master Services Agreement or other legal documents beyond a proposal which accompany a proposal.</b>  |

## **6.0 References**

|            |   |
|------------|---|
| <b>6.1</b> | <b>Please provide as an attachment at least three references for clients with similar operations to the proposed solution. Please include at least two references who are/will be continuing to have employees working remotely. Include contact names, phone numbers, email addresses, and industry.</b> |
| <b>6.2</b> | <b>Please provide as an attachment a Certificate of Insurance.</b>  |

Please provide any other information you feel should be considered in our evaluation.