



# REQUEST FOR PROPOSAL

For: IT Managed Services

[www.rfsuny.org](http://www.rfsuny.org)



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You are invited to submit a bid proposal to The Research Foundation of SUNY. For more information on the Research Foundation visit our website @ [www.rfsuny.org](http://www.rfsuny.org)

## Section 1: General Standard Information and Instructions

### Summary

#### Due Dates (and Times, if applicable):

Application: 06/08/2018

Questions: 06/22/2018

Proposals: 07/06/2018

Decision Date: 12/31/2018

#### Location of Service:

35 State Street

Albany, NY 12207

#### Inquiries to:

Alan Tosi

Director of IT Operations

35 State Street

Albany, NY 12207-2826

518-434-7290

alan.tosi@rfsuny.org

### Proposal Submission

When submitting a proposal, you must:

1. Prepare a clearly readable document that provides information in the order requested and attach all required information.
2. Indicate any deviations from the specifications.
3. Sign the proposal. Your signature indicates full knowledge and acceptance of this Request for Proposal ("RFP").
4. Submit five (5) complete proposals, one of which must have original signatures. Proposals should be sealed, clearly marked "sealed proposal," and addressed to:

David Martin

Campus Services Manager

35 State Street

Albany, NY 12207-2826

5. Submit the proposal so that it is received by the due date (and time, if applicable). We will not accept proposals submitted electronically.

## Response to Inquiries

Any inquiries about the requirements of this Request for Proposal or any apparent omission or discrepancy should be presented in writing to the Research Foundation representative listed below. All formal inquiries must be submitted no later than twenty-one (21) calendar days after the issuance of this Request for Proposal. Failure to submit inquiries by this deadline may result in the inquiry not being answered. The Research Foundation representative will then answer each question and disseminate the answers in writing to each firm or individual that received an RFP. If necessary, the Research Foundation representative will issue a written amendment to the Request for Proposal. Oral statements or instructions do not constitute an amendment to this Request for Proposal.

Alan Tosi  
Director of IT Operations  
35 State Street  
Albany, NY 12207-2826  
518-434-7290  
alan.tosi@rfsuny.org

### The Research Foundation reserves the right to

1. Reject any, and all proposals received in response to this RFP.
2. Request references and financial statements for the most recently completed fiscal year.
3. Contact any or all references.
4. Waive requirements or amend this RFP on notification to all bidders. Mandatory requirements may be eliminated if unmet by all bidders.
5. Adjust or correct cost or cost figures with the concurrence of the bidders if mathematical or typographical errors exist.
6. Negotiate with bidders responding to this RFP within the requirements necessary to serve the best interests of the Research Foundation.
7. Begin contract negotiations with another bidder in order to serve the best interests of the Research Foundation ,should the RF be unsuccessful in negotiating a contract with the successful bidder within an acceptable time frame.
8. Reject any or all portions of any offer, to negotiate terms and conditions consistent with the solicitation, and to make an award for any or all remaining portions.
9. Request clarifications from bidders for purposes of assuring a full understanding of responsiveness, and further to permit revisions from all bidders being considered for contract award, prior to award.
10. Waive minor irregularities.

## **Compliance with Laws and Regulations: Non-Discrimination, Equal Opportunity and Affirmative Action Obligations**

The awarding of this business and continuation of services are subject to the requirements of Executive Order 11246 and 11375 and the rules and regulations of the Secretary of Labor (41 CFR Chapter 60) in promoting Equal Employment Opportunities.

The successful bidder must certify that it does not and will not discriminate or unduly favor any employees or agents on the basis of race, gender, national origin, religion or disability. As part of this contract, bidder must agree to comply with all applicable provisions of Section 503, Title V of the Vietnam Era Veterans' Readjustment Assistance Act of 1972, as the same may be from time to time amended, together with all applicable regulations thereunder and all applicable provisions of Sections 503 and 504 of the Rehabilitation Act of 1973 (Public Law 93-516) as the same may be from time to time amended, together with all applicable regulations thereunder.

## **Liability and Indemnification**

The successful bidder will be responsible for the work, direction, and compensation of its employees, consultants, agents, and contractors. Nothing in the resulting agreement or the performance thereof by the successful bidder will impose any liability or duty whatsoever on the Research Foundation including, but not limited to, any liability for taxes, compensation, commissions, unemployment insurance, Workers' Compensation, disability benefits, Social Security, or other employee benefits for any person or entity. The successful bidder shall hold harmless and indemnify the Research Foundation, their officers and employees from and against any injury, damage, loss of liability to persons or property resulting from or arising out of (a) the agreement, and (b) the acts, omissions, liabilities, or obligations of the successful bidder, any affiliate, or any person or entity engaged by the successful bidder as an expert, consultant, independent contractor, subcontractor, employee or agent.

## **Additional Terms and/or Conditions**

1. The following items will be incorporated into and made part of, the formal agreement: (1) the Research Foundation's RFP; (2) the successful bidder's proposal.
2. In the event of any inconsistency in or conflict among the document elements of the agreement described above, such inconsistency or conflict shall be resolved by giving precedence to the document elements in the following order: (1) the Agreement (2) this RFP (3) the successful bidder's proposal.
3. Any terms that are attached or referenced with a submission shall not be considered part of the bid or proposal, but shall be deemed included for informational purposes only.
4. The resulting agreement shall be binding upon its execution by both parties.
5. The agreement may be revised at any time upon mutual consent of the parties in writing. Such written consent will not be effective until signed by both parties.
6. The relationship of the successful bidder to the Research Foundation shall be that of an independent contractor.
7. Proposed prices should reflect all discounts including educational discounts.

8. The submission of a proposal constitutes a binding offer to perform and provide said services. Such binding offer shall be firm and not revocable for a period of 180 days after the deadline for proposal submission and will continue thereafter until the successful bidder notifies the Research Foundation otherwise, in writing. Such deadline may be further extended by mutual agreement.
9. In the event successful bidder uses partners, subcontracts or subcontractors, the successful bidder will remain responsible for compliance with all specifications and performance of all obligations under the contract resulting from this RFP.
10. The Research Foundation will not be liable for any cost associated with the preparation, transmittal, or presentation of any proposals or materials submitted in response to this RFP.
11. All bids or proposals submitted in response to the solicitation become and remain the property of the Research Foundation and should any doubt, or difference of opinion arise between the Research Foundation and the bidder as to the items to be furnished or the interpretation of the provisions in the solicitation, the decision of the Research Foundation shall be final and binding upon all parties.
12. This RFP and the resulting contract shall be governed by the Laws of the State of New York.
13. Public announcements or news releases regarding this RFP or any subsequent award of a contract must not be made by any bidder without the prior written approval of the Research Foundation.
14. The successful bidder is responsible for compliance with all applicable rules and regulations pertaining to cities, towns, counties, and State where the services are provided, and all other laws applicable to the performance of the resulting contract. The successful bidder shall provide all necessary safeguards for safety and protection as set forth by the United States Department of Labor, Occupational Safety and Health Administration.

## Bidders Certification

Bidders must submit the following:

1. This completed certification.
2. Information as requested in Sections 2 through 6.

If you are not submitting a bid proposal, The Research Foundation requests the following:

1. Respond "No Bid will be submitted" and state your reason(s).
2. Return only this page to the Issuing Office address on Page 1.

Bidders, please respond to the following inquiries and/or certifications:

1. Is the price quoted the same as or lower than that quoted other corporations, institutions or governmental agencies for similar service and/or like equipment or supplies?  
Yes: \_\_\_  
No: \_\_\_  
If no,  
explain:
2. Does your firm agree that all presentations and materials will be free from racial, religious, or sexual bias?  
Yes: \_\_\_  
No: \_\_\_
3. Are you or any officer of your organization or any part owning or controlling more than 10 percent of your stock if you are a corporation or any member if you are a firm or association, an officer or employee of the Research Foundation of SUNY or of a public benefit corporation of the State of New York?  
Yes: \_\_\_  
No: \_\_\_
4. Within the past five years has your firm, any affiliate, any predecessor company or entity, owner, director, officer, partner or proprietor been the subject of a government suspension or debarment?  
Yes: \_\_\_  
No: \_\_\_
5. Name of Firm:  
  
Address:  
  
City/State/Zip:  
  
Telephone Number (area code/number):  
  
Fax Number (area code/number):  
  
Employer's Federal ID Number:  
  
E-Mail Address:  
  
Bidder's Name/Title:  
  
Bidder's Signature/Date: \_\_\_\_\_

## Section 2: Overview

The Research Foundation for The State University of New York (RF) is the largest comprehensive university-connected research foundation in the country. It exists to serve the State University of New York (SUNY) by providing essential administrative services that enable SUNY faculty to focus their efforts on the education of students and the performance of life-changing research across a wide range of disciplines including medicine, engineering, physical sciences, energy, computer science, and social sciences. The RF is a private non-profit education corporation that is tax-exempt under Internal Revenue Code (IRC) Section 501(c) (3).

The Research Foundation for SUNY (RF) is currently under contract with a third party to provide IT Managed Services. Services include operational and project related services. This contract expires on June 30<sup>th</sup>, 2019. The existing managed services agreement provides IT related services across the following functional areas:

1. Application Services
2. Data Center Services
3. Service Desk Services
4. Networking Services
5. Workstation & Printer Services
6. Network Operating System Services
7. Voice, Video, and VoIP Services
8. IT Security

IT services are principally provided to approximately 110 employees located at 35 State Street, Albany, NY and three data centers (two in Albany and one in Utica). Telephone support services are also provided to SUNY campuses abroad as it relates to application access to the RF's business systems.

The RF also has an internal Information Services Team that consists of a CIO; two Director Level positions; and a team of nine Business Systems Analysts. The internal IS Team works collaboratively with the existing managed service provider to provide application development and support services to its internal and campus stakeholders. The RF has no plans at this time to transition internal IS Team provided services to a third-party vendor.

The goal of this RFP is to solicit bids and select vendors to transition applicable services prior to contract expiration. Vendors are not required to bid on all service areas and may choose to bid on areas that best align with their expertise and service portfolio.

Detailed proposal requirements and technical services requirement are outlined in "**Section 3: Proposal Requirements**" and "**Section 4: Business Requirements**" below.



## Section 3: Proposal Requirements

### Overview

The requirements established by this RFP will be enforced in evaluating proposals. The bidder's compliance with the format prescribed herein, as well as the bidder's response to each specific requirement stated in the RFP will be considered during the evaluation process. Therefore, it is in the best interest of each bidder to become familiar with the format required.

### Mandatory Elements for Qualification

Bidders must submit the following:

- i. The completed and signed Attachment A: Application for Contract with the Research Foundation for the State University of New York and Bidder Certification. This form must have an original signature signed by an official authorized to bind the bidder to its provisions.
- ii. Your company's most recently audited financial statements, as a separate attachment.
- iii. Description of experience, resources, and references to include the following information:

#### Experience:

- i. Provide a brief company history and the year your entity was founded.
- ii. Describe your company's size and commitment to Higher Education (including the percentage of total revenue derived from Higher Education clients).
- iii. Describe your company's vision and growth objectives, including how you plan to achieve your vision and objectives.
- iv. Describe how much experience your company has with providing similar IT Managed Services.
- v. Please provide examples of current versions of contracts and service level agreements that you utilize to provide IT Managed Services.
- vi. Tell us anything else about your company's mission or vision that you think is important for us to know.
- vii. Include any other factors which you believe make your organization especially qualified to provide IT Managed Services.
- viii. Describe any experience your company has in supporting IT Managed Services (including websites) as it relates to persons with disabilities and access to IT systems for persons with disabilities.

#### Resources:

- i. Describe the background, experience, and qualifications of the specific personnel that will be assigned to provide IT Managed Services.

- ii. Describe the specific personnel who will have overall responsibility for managing the delivery of IT Managed Services.
- iii. Clearly, state and specifically identify any subcontractors or subcontracts which are to be used to deliver any of the services contained in the proposal. If any, approval of their involvement by the RFSUNY will be required.
- iv. Provide a learning and development vision and plan that describes how your organization supports the growth of its employees and ensures employees stay current with existing and future technologies.

**Strategy:**

- i. Provide a high-level approach and strategy as to how your organization would transition the existing managed services to your organization. Please include any assumptions or requirements on the part of the RF to ensure a successful transition of services.
- ii. Provide an organizational design that you would implement to manage the IT Managed Services required by this RFP. Include skill sets of the team, processes, and methodologies you would use in your response. (Please use, "Attachment B – IS Summary Job Descriptions" in the development of your organizational design.)
- iii. Describe any resources/personnel that are required from the RF Information Services team and functional staff required to implement and maintain a successful transition of services.
- iv. Describe your organizations data center locations and data center strategy. Describe the percentage of US based data centers versus overseas data centers.

**References:**

List the organization name, address, telephone number, and name of a contact person for all clients with whom you have worked within the past three years and who can measure and attest to your qualifications specific to this area and to the persons you will assign to this project. Please provide a description of the services provided and the length of the relationship.

**Fee Proposal:**

RFSUNY is seeking top quality services and expertise and understands that organizations that can offer such services are entitled to fair compensation for their services. At the same time, complete transparency in compensation for services is essential. Bidders must submit a separate financial exhibit (as an attachment to the RFP response) showing the fee for services within the scope of this RFP. Fees structure should be broken out annually for each area in which the respondent wishes to bid and should assume a minimum term of five years.

**Insurance:**

The successful bidder will, at all times during the term of the contract term, at their own expense, carry commercial general liability insurance and property damage insurance in the amount of \$2,000,000 naming The Research Foundation for The State University of New York and the State University of New York as additional insured, and, as required, professional liability insurance in the amount of \$5,000,000. Excess policies can be used to meet required limits. Other insurance requirements may be required and negotiated as a part of the contract with the successful bidder.

## Section 4: Business Requirements

### Instructions:

Vendors should first select which areas in which they intend to bid and then complete the applicable portions of the matrix below. Applicable sections must be completed in their entirety. Failure to complete the applicable sections in entirety will result in disqualification for consideration in that particular area. Vendors may select any or all areas in which to bid.

	Managed Services Area	Intend to Bid (Y/N)
I.	Application Services <i>Application Development, Support, &amp; Maintenance</i>	
II.	Data Center Services <i>Maintenance &amp; Support of AIX &amp; Linux Servers</i>	
III.	Service Desk Services <i>Call Center &amp; Incident Management</i>	
IV.	Networking Services <i>Maintenance &amp; Support of LAN/WAN</i>	
V.	Workstation & Printer Services <i>Desktop Support Services</i>	
VI.	Network Operating System Services <i>Maintenance &amp; Support of Windows Servers</i>	
VII.	Voice, Video, & VoIP Services <i>Telephony, Skype, WebEx, Conferencing</i>	
VIII.	IT Security <i>Support of IT Security Operations</i>	

## I. Application Services

### Description:

The Research Foundation (RF) has an extensive application portfolio that includes enterprise applications that are directly accessed by campuses across the SUNY network as well as localized applications that support the Research Foundations Central Office (RFCO) operations. Systems that are directly accessed by SUNY campuses include: Oracle EBS; Oracle OBIEE (RF's Report Center); Oracle Portal; Huron's Click Portal (SUNY PACS); and Huron's Employee Compensation Compliance System (eCRT). The successful managed services provider must be able to provide application development and support for the RF's enterprise systems and provide application maintenance and support for the RF's application portfolio.

Item	Activity	Currently Offered by Vendor (Y/N)	% of Activity Sub-Contracted
1.	Provide development, application support and maintenance for Oracle EBS HR Module		
2.	Provide development, application support and maintenance for Oracle EBS HR Self Service		
3.	Provide development, application support and maintenance for Oracle EBS Benefits Custom Oracle Module		
4.	Provide development, application support and maintenance for Oracle EBS Custom Retirement Processing		
5.	Provide development, application support and maintenance for Oracle EBS Advanced Benefit Module		
6.	Provide development, application support and maintenance for Oracle EBS Manager Self Service Module		
7.	Provide development, application support and maintenance for Oracle EBS Labor Distribution Module		
8.	Provide development, application support and maintenance for Oracle EBS Oracle Payroll Module		
9.	Provide development, application support and maintenance for Oracle EBS Customized Payroll Encumbering		
10.	Provide development, application support and maintenance for Oracle EBS AP Module		
11.	Provide development, application support and maintenance for Oracle EBS AR Module		
12.	Provide development, application support and maintenance for Oracle EBS GL Module		
13.	Provide development, application support and maintenance for Oracle EBS "iexpense" online expense reporting		
14.	Provide development, application support and maintenance for Oracle Revenue Reporting Application		
15.	Provide development, application support and maintenance for Oracle EBS Cash Management Module		
16.	Provide development, application support and maintenance for Oracle EBS Grants/Projects Accounting Module		
17.	Provide development, application support and maintenance for Oracle Accounts Payable SOA based Web Services		
18.	Provide development, application support and maintenance for Oracle EBS Inventory Module		
19.	Provide development, application support and maintenance for Oracle EBS PO Module		
20.	Provide development, application support and maintenance for Oracle EBS Alerts Module		
21.	Provide development, application support and maintenance for Oracle EBS Workflow		

22.	Provide development, application support and maintenance for Oracle EBS AME Approvals		
23.	Provide development, application support and maintenance for EIS Technologies Hourly Time Reporting Module		
24.	Provide development, application support and maintenance for RF's Customized Indirect Cost Processing (IDC)		
25.	Provide development, application support and maintenance for Oracle OBIEE (Report Center)		
26.	Provide development, application support and maintenance for Informatica for Extract, Transform & Load (ETL) activities		
27.	Provide development, application support and maintenance for Appworx (CA Automic) for monitoring scheduled activities		
28.	Provide Nightly Batch Schedule operations for Oracle EBS and OBIEE		
29.	Support Daily ACH Transactions		
30.	Support/Provide AP Vendor and Payroll printing operations		
31.	Provide application support and maintenance for Oracle Weblogic application servers		
32.	Provide database application support and maintenance for Oracle database servers		
33.	Provide development, application support and maintenance for Oracle Portal login portlet		
34.	Provide development, application support and maintenance for Oracle Portal Validation Application (validates new authorized users)		
35.	Provide development, application support and maintenance for Oracle Portal Announcement Portlet		
36.	Provide development, application support and maintenance for Oracle Portal Application Authentication		
37.	Provide development, application support and maintenance for Oracle Portal Change Password Portlet		
38.	Provide development, application support and maintenance for Oracle Portal Forgot Password Portlet		
39.	Provide development, application support and maintenance for Oracle Grants Customize Data Segregation (Security)		
40.	Provide application support and maintenance for Huron's Employee Compensation Compliance System (eCRT) system		
41.	Provide development, application support and maintenance for Huron Click Portal		
42.	Provide development, application support and maintenance for Huron Click COI Module		
43.	Provide development, application support and maintenance for Huron Click IRB Module		
44.	Provide development, application support and maintenance for Huron Click Agreements Module		
45.	Provide development, application support and maintenance for Huron Click Grants Module		
46.	Provide development, application support and maintenance for Huron Click IACUC Module		
47.	Provide development, application support and maintenance for Huron Click Safety Module		
48.	Provide development, application support and maintenance for TerminalFour CMS (RF's Internet Platform)		
49.	Provide application support and maintenance for applications listed in the RF's Application Portfolio		
50.	Stay current with emerging technology and make forward-looking recommendations as it pertains to the RF's		
51.	Ensure availability of the RF application portfolio per prescribed SLA's		
52.	Provide weekly, monthly, and quarterly metrics and KPI's in support of the RF's application portfolio.		

53.	Provide Change Management services in support of the RF's application portfolio.		
54.	Provide Quality Assurance services in support of the RF's application portfolio.		
55.	Provide Project Management Services for projects relating to Application Services.		
56.	Apply, renew, and update Security Certificates relating to Application Services.		

## Application Catalog

Application Short Name	Application Full Name	Version	Vendor	Purpose
AchieveIT	AchieveIT		AchieveIT	Web-based software solution to solve problems of strategic planning and execution
Adobe Acrobat	Adobe Acrobat XI Pro	11.0.10	Adobe	Tool for document reader, write, editing
AppWorx	AppWorx	8.0 P15 HF1	Automic	Scheduling software for Oracle systems
Asset 4000	Asset 4000		Real Asset Management	Asset Management and Tracking Software
BioPharm Insight	BioPharm Insight Subscription		BioPharm Insight	Life science news and analytics solution
CITI	Collaborative Institutional Training Initiative		BRANY	Compliance Educational Training
Comprehensive Rate Information	Long / Short Form Comprehensive Rate Information	2009	Maximus	Comprehensive Rate Info System - Finance-Long / Short Form Licenses
Data Protection - Backup and Recovery	Data Protection - Backup and Recovery	10.0.0	Commvault	Backup and recovery solution
Dreamweaver	Macromedia Dreamweaver MX	6	Adobe	Design, develop, and maintain websites and applications
EBS	E-Business Suite	12.1.3	Oracle	Support all of Finance, HR, accounting, business applications for SUNY campuses in NYS
eCRT	Effort Reporting	4.5	Huron	eCRT system delivers an electronic-based solution designed to record, track and support all effort reporting
EIS	EIS		EIS	Oracle Time and Labor (OTL) application interface
Endpoint Security	Endpoint Security	6.3.2016.0	ESET	Antivirus and internet security
Firefox	Mozilla Firefox	52.4.0.0	Mozilla	Web Browser
Fireworks	Macromedia Fireworks MX	6	Adobe	Graphics application for web designers
GLWand	GLWand	5.5	Excel4Apps	Import/Export, report General Ledger Data

GoAnimate	GoAnimate		GoAnimate	Cloud-based, animated video creation platform
Google Chrome	Google Chrome	63.0.3239.84	Google	Web Browser
Hotline and Issue Management	Hotline and Issue Management		NAVEX Global	Ethics Hotline and Case Management Software
IE	Internet Explorer		Microsoft	Web Browser
InCommon	InCommon Federation		Internet2	Solution to allow campuses Federated login to RF systems via campus credentials
IncuTrack	IncuTrack		Cybergroup Incorporated	Saves time, money, and helps clients, staff, and mentors collaborate
Informatica	Report Center	10.1.1	Informatica LLC	Informatica is a data integration tool based on ETL architecture. It provides data integration software and services for various businesses, industries and government organizations including telecommunication, healthcare, financial and insurance services.
Informz	Email / Marketing Automation		Informz	Email marketing and marketing automation solutions
InnovationQ	Patent Search Tool		ip.com	The ability to discover intellectual property opportunities with a global database
Interview Exchange	Interview Exchange		Hirezon Interview Exchange	HR Software for Interviews, applicant tracking system
Inteum	Inteum		Inteum Company LLC	Technology Transfer Software
KBACE	KBACE	4238	Cognizant	Third-party software used by Oracle Payroll and HR applications for data analysis
Leankit	Leankit		Planview	Project Management solution
Legal Files	Legal Files MSO Client Tools	2.1.192	Legal Files	Legal management case and matter management
myRF	SharePoint	15	Microsoft	SharePoint site for RF intranet



Nexis	Nexis		LexisNexis	Computer-assisted legal research and risk management services
Office 365	Microsoft Office 365 ProPlus - en-us	365	Microsoft	Outlook / Microsoft Word / Excel, etc
Oracle Workflow Builder / Forms Builder / Report Builder / BI Publisher / J Developer	Oracle Workflow Builder		Oracle	Tool to develop workflows in EBS
Payroll Tax	Payroll Tax		Vertex	Tax tables for payroll.
Portal, SSO	Single Sign-On Portal	10.1.2.3.0	Oracle	Oracle web-based login tool that provides authentication to Oracle EBS and Report Center.
PPM / Quality Center	Project and Portfolio Management & Quality Center	9.1.4	Hewlett-Packard	Quality Control, Change Control and Ticketing System to manage Service Requests for development activities
Prezi	Prezi		Prezi, Inc.	Presentation software
Project Professional	Microsoft Project Professional 2013 - en-us	15.0.4859.1002	Microsoft	Project Management product for developing plans and assigning resources
Red Hat Linux	Red Hat Linux		Tech Data	Linux OS for Data Center Servers
RightFax	RightFax		OpenText	Centralized fax server solution that provides the best foundational platform for secure faxing capabilities across an entire organization
Risk Manager	Osprey COI Risk Manager		Osprey	Compliance
SecureCRT/SecureFX	SecureCRT /SecureFX FTP Client		VanDyke Software	Secure CRT allows remote connection to sessions that encompass all RF environments.
SFTP Client	SSH File Transfer Protocol	5.7.5	WinSCP	Multi-functional tool that improves productivity, copies files between and remotely
Skype™	Skype™	7.33.105	Skype	Instant Messaging
Snagit	Snagit	12.3.1	TechSmith	Screenshot tool

SOA Jaggaer / iLab	SOA - Stony Brook	11.1.1.9	Jaggaer	Upload Invoices, Upload PO, Validate Account String, Validate Server Uptime, Lookup Buyer ID, Sync Vendor/Vendor Sire Info
SuccessFactors	SuccessFactors		SAP	Performance Management
SUNY PACS	Click Portal	6.2.4.0	Huron	Online administrative tool designed to help researchers and administrators in the area of Pre-award and compliance.
Survey Monkey	Survey Monkey		Survey Monkey	Customer Satisfaction Surveys
TeamMate	Wolters Kluwer TeamMate		Wolters Kluwer Financial Services	Teammate Audit Software
Technical Insights Research	Technical Insights Research		Frost & Sullivan	Intelligent analysis of technical developments, for fast growth
Technology Transfer Transaction Toolbox	Technology Transfer Transaction Toolbox		Innovation Q	Suite of Tech Transfer Tools
Time Reporting	Hourly Time Reporting Software		EIS	EIS - Hourly Time Reporting Software
TOAD	Toad Data Modeler	5.3.4.13	Quest Software	Tool used to measure relational and non-relational databases
Tracker	StoneRiver Tracker		Stone River	Insurance Software for Treasury
Visio	Microsoft Visio		Microsoft	Diagramming and vector graphics application
Visual Compliance	Export Classification		Visual Compliance	Export Controls Screening
VMware	VMware	4.5.0.293049	VMware	Virtually connect to PC, hosting virtual servers and desktops
VSS	Visual Source Safe		Microsoft	Maintain source archive (APPWORX, INFORMATICA, SQL definitions, PL/SQL packages, procedures, functions, and triggers).
Web Service - Buffalo / Stony Brook	Web Service - Buffalo	NA	UB Web Service Team	Upload PO, Validate Account String, Validate Server Uptime
WeComply	WeComply		Thomson Reuters / WeComply	HR Training Tool
Windows 7 Pro	Windows 7 Pro	6.1.7601	Microsoft	Operating system

Windows Server 2012	Windows Server 2012	6.2.9200	Microsoft	Group of operating systems at the enterprise level
XenServer	XenServer	6.0.57617	Citrix	Virtualization management platform optimized for application, desktop and server virtualization infrastructures

## II. Data Center Services

### Description:

Data Center Services encompasses those services required to maintain the RF's enterprise (non-Windows) servers and storage, supporting the RF's business applications. These systems include AIX and Linux based systems and storage; and backup and recovery of these systems. The Research Foundations primary data center is located at the SUNY Polytechnic Institute with a backup data center located at SUNY Utica. A smaller subset of equipment supporting Oracle Portal resides in the SUNY Administration building in Albany, NY. The RF currently hosts approximately 32 physical and 100 virtual servers (Windows, Linux, and AIX)

Item	Activity	Currently Offered by Vendor (Y/N)	% of Activity Sub-Contracted
1.	Provide recommendations to the RF in the review and procurement of enterprise class data center systems.		
2.	Build and maintain AIX servers & associated storage utilizing industry best practices.		
3.	Patch and maintain AIX servers per prescribed schedule.		
4.	Implement and maintain Security Policies and Permissions on AIX servers.		
5.	Ensure availability of AIX based systems per prescribed SLA's		
6.	Provide backup and recovery of AIX based systems.		
7.	Build and maintain Linux servers & associated storage utilizing industry best practices.		
8.	Patch and maintain Linux servers per prescribed schedule.		
9.	Implement and maintain Security Policies and Permissions on Linux servers.		
10.	Ensure availability of Linux based systems per prescribed SLA's		
11.	Provide backup and recovery of Linux based systems.		
12.	Provide Project Management Services for projects relating to Data Center Services.		
13.	Stay current with emerging technology and make forward-looking recommendations as it pertains to the RF's Data Center environments.		
14.	Implement and maintain backup services for the RF's enterprise systems and storage.		
15.	Provide monitoring services for the RF's AIX and Linux based systems.		
16.	Provide weekly, monthly, and quarterly metrics and KPI's in support of the RF's Data Center Services.		
17.	Provide Change Management services in support of the RF's Data Center Services.		
18.	Provide Quality Assurance services in support of the RF's Data Center Services.		
19.	Apply, renew, and update Security Certificates relating to Data Center Services.		

### III. Service Desk Services

**Description:**

Service Desk Service encompasses those services that include the receipt, categorization, and initial triage for incidents and services requests, as determined by ITIL standards and best practices. The Service Desk is the initial point of contact for all incidents and service requests from the RF’s central office and for those users across SUNY campuses that utilize the RF’s business systems. The RF’s Service Desk intakes approximately 11,000 to 12,000 incidents annually. The RF’s Service Desk assigns 1,100 – 1,200 incidents annually to the RF’s local desktop support team for resolution; with the remaining being resolved by the Service Desk (password resets, permissions, etc.) The RF’s Service Desk intakes calls for both campuses accessing the RF’s enterprise systems and for RF staff at 35 State Street, Albany.

Item	Activity	Currently Offered by Vendor (Y/N)	% of Activity Sub-Contracted
1.	Receive incoming requests via telephone or e-mail.		
2.	Properly classify incoming requests as incidents or service requests.		
3.	Properly classify priority of incoming requests based on impact and urgency.		
4.	Provide initial triage and resolution (if possible) for incoming requests.		
5.	Escalate incidents and services requests to appropriate levels, as required.		
6.	Meet speed to answer, call answer rate, and call back rate per defined SLA's.		
7.	Meet response time and time to resolve metrics per defined SLA's.		
8.	Provide weekly, monthly, and quarterly metrics and KPI's in support of the RF's Service Desk Services.		

## IV. Networking Services

### Description:

Networking Services encompasses those services required to maintain the RF's Cisco-based Local Area Network (LAN), and Wide Area Network (WAN). Included in these services is the provisioning and maintenance of the necessary circuits to maintain the RF's network infrastructure as well as remote access services for the RF's employees. The RF operates a modern Cisco based LAN/WAN infrastructure.

Item	Activity	Currently Offered by Vendor (Y/N)	% of Activity Sub-Contracted
1.	Provide recommendations to the RF in the review and procurement of networking systems.		
2.	Design, implement and maintain a LAN/WAN infrastructure that best meets the needs of the RF.		
3.	Work with vendors to procure and provision circuits to meet the needs of the RF's infrastructure environment.		
4.	Provide Project Management Services for projects relating to Networking Services.		
5.	Configure and manage the RF's LAN switches, routers, load balancers, and firewalls.		
6.	Provide solutions for data center environments, including disaster recovery.		
7.	Configure and manage the RF's remote access (VPN, and VMware view) environments.		
8.	Configure and manage the RF's Intrusion Detection and Preventions (IDS/IPS) environment.		
9.	Ensure adequate network security protocols via industry best practices.		
10.	Ensure availability of the RF's infrastructure (LAN/WAN) per prescribed SLA's		
11.	Patch and maintain RF's network infrastructure.		
12.	Maintain an inventory of the RF's networking devices.		
13.	Stay current with emerging technology and make forward-looking recommendations as it pertains to the RF's networking systems.		
14.	Provide weekly, monthly, and quarterly metrics and KPI's in support of the RF's Networking Services.		
15.	Provide Change Management services in support of the RF's Networking Services.		
16.	Provide Quality Assurance services in support of the RF's Networking Services.		
17.	Apply, renew, and update Security Certificates relating to Networking Services.		

## V. Workstation & Printer Services

### Description:

Workstation and Printer Services encompasses those services required to maintain the RF's end-user point devices. This includes complete management of the RF's desktops, laptops, printers, and other mobile devices. Workstation and printer services are limited to supporting the RF's Central Office Staff at 35 State Street, Albany. The RF maintains approximately 120 Windows desktops and laptops; 2 Macintosh desktops and laptops; and 26 local and network printers.

Item	Activity	Currently Offered by Vendor (Y/N)	% of Activity Sub-Contracted
1.	Provide recommendations to the RF in the review and procurement of end-user systems.		
2.	Develop and create system images for end-user systems.		
3.	Deploy end user systems (as needed) for hires or as part of normal system refreshes.		
4.	Provide on-going day-to-day management of RF's end-user systems and devices.		
5.	Protect the RF's end-user systems via the use of anti-virus and anti-malware solutions.		
6.	Provide services to ensure proper destruction and disposal of systems that are end of life.		
7.	Patch and maintain Windows and Macintosh end-user devices per prescribed schedule.		
8.	Patch and maintain Microsoft Office Products that are installed on end-user devices.		
9.	Deploy software packages to end-user systems as specified by the RF.		
10.	Contact vendors (Xerox, HP, or otherwise) on behalf of the RF for printer related issues.		
11.	Maintain and manage the RF's network printers, including toner replacement and regular printer maintenance.		
12.	Provide Project Management Services for projects relating to Workstation & Printer services.		
13.	Maintain an inventory of the RF's workstation and printer devices.		
14.	Ensure availability of the RF's workstations and printers per prescribed SLA's		
15.	Stay current with emerging technology and make forward-looking recommendations as it pertains to RF's workstations and printers.		
16.	Provide weekly, monthly, and quarterly metrics and KPI's in support of the RF's Workstation & Printer Services.		
17.	Provide Change Management services in support of the RF's Workstation & Printer Services.		
18.	Provide Quality Assurance services in support of the RF's Workstation & Printer Services.		
19.	Apply, renew, and update Security Certificates relating to Workstation & Printer Services.		

## VI. Network Operating System Services

### Description:

Network Operating Services encompasses those services required to maintain the RF's Microsoft Active Directory and NTFS File Services. These services include the management of Windows Servers, SharePoint Servers, and Microsoft SQL Servers, along with their associated file and database repositories. Network Operating System Services includes complete management and oversight of all Windows devices located in the RF's Data Centers or in the private/public cloud. The RF currently hosts approximately 32 physical and 100 virtual servers (Windows, Linux, and AIX).

Item	Activity	Currently Offered by Vendor (Y/N)	% of Activity Sub-Contracted
1.	Manage a Microsoft Active Directory environment, including moves, adds, and changes.		
2.	Maintain Domain Name Services (DNS) in a Microsoft Active Directory environment.		
3.	Build and maintain Windows servers & associated storage utilizing industry best practices.		
4.	Patch and maintain Windows servers per prescribed schedule.		
5.	Implement and maintain Group Policies.		
6.	Implement and maintain Security Policies.		
7.	Provision and maintain Active Directory user accounts.		
8.	Provision and maintain, workstations, server, and printer objects in an Active Directory environment.		
9.	Implement and maintain File and Network shares and permissions utilizing industry best practices.		
10.	Implement and maintain backup and recovery of Microsoft Active Directory and NTFS file shares.		
11.	Stay current with emerging technology and make forward-looking recommendations as it pertains to Microsoft Active Directory and NTFS File Services.		
12.	Ensure availability of the RF's Windows Active Directory and Server environment per prescribed SLA's.		
13.	Maintain an asset inventory of Windows Servers and File Systems.		
14.	Integrate and Operate an On-Premise Active Directory Services with O365 and Amazon Web Services		
15.	Build and maintain Windows SharePoint services, including integration with Microsoft Active Directory Services		
16.	Provide recommendations to the RF in the review and procurement of Windows-based server systems.		
17.	Provide Project Management Services for projects relating to Network Operating System services.		
18.	Provide backup and recovery of Windows-based servers and storage.		
19.	Provide weekly, monthly, and quarterly metrics and KPI's in support of the RF's Network Operating System Services.		
20.	Provide Change Management services in support of the RF's Network Operating System Services.		
21.	Provide Quality Assurance services in support of the RF's Network Operating System Services.		
22.	Apply, renew, and update Security Certificates relating to Network Operating System Services.		



## VII. Voice, Video & VoIP Services

### Description:

RF's voice systems are provided by SUNY Administration and external providers (Verizon, AT&T, etc.) RF hosted Video Services include WebEx and Skype for Business.

Item	Activity	Currently Offered by Vendor (Y/N)	% of Activity Sub-Contracted
1.	Coordinate with SUNY Administration in moves, adds, changes to RF deployed telephones.		
2.	Act as single point of contact to the RF for telephony related issues.		
3.	Perform level 1 triage for any issues that are reported.		
4.	Escalate issues (as needed) to SUNY Administration.		
5.	Contact vendors (Verizon, AT&T, WebEx, etc.) on behalf of the RF for telephony or video related issues.		
6.	Assist users with setting up Skype for Business, WebEx, or other video conference meetings/sessions.		

## VIII. IT Security

### Description:

IT Security encompasses the complete oversight of IT security functions within the RF. These functions serve to assist the RF's CISO and CIO in ensuring compliance with IT Security best practices, and reducing the RF's exposure to existing and future IT Security threats.

Item	Activity	Currently Offered by Vendor (Y/N)	% of Activity Sub-Contracted
1.	Develop effective information security policies and standards, monitor compliance and work with business units to ensure information security program supports organizational goals and objectives.		
2.	Develop, deploy and manage an information and cybersecurity framework which uses industry best practices and ensures compliance with federal and New York State regulatory requirements.		
3.	Develop and recommend strategies through risk management practices to evaluate inherent risks and controls, and ensure acceptable residual risks.		
4.	Directly manage the information security reporting processes and prepare the Annual Information Security Report to the CISO and CIO.		
5.	Directly manage threats, vulnerabilities, and incidents within the information processing infrastructure.		
6.	Directly manage or oversee the testing and monitoring of security controls, systems and procedures to assess adequacy and effectiveness.		
7.	Provide information assurance guidance through consultation with business units, and service providers during project and product development efforts to ensure that appropriate security controls are considered during and integrated with vendor selection and process development efforts.		
8.	Serve as technical advisor to CISO and CIO on information security related matters pertaining to the business, to ensure appropriate risk management.		
9.	Collaborate with CISO and CIO on incident response planning and reporting for information security activities, and execute accordingly.		
10.	Respond directly to security events with emergency actions to protect the RF and its customers from an imminent loss of information or value. (A security event occurs when the confidentiality, integrity, availability or accountability of an information system is compromised.)		
11.	Ensure access to all information systems are controlled, both internally and externally, commensurate with the level of potential risk.		

12.	Oversee the training of information security awareness, including related educational materials and presentations, and ensure all employees understand obligations and responsibilities within the objectives of the information security policy and program.		
13.	Monitor and keep informed about regulation, technology trends, industry standards and best practices related to information security risks, controls and technologies.		
14.	Provide weekly, monthly, and quarterly metrics and KPI's in support of the RF's IT security services.		

## Section 5: Evaluation and Selection

### Criteria General Criteria for Selection

Only those proposals received by the stated deadline will be considered. All proposals, submitted by the deadline, will be reviewed and evaluated based upon information provided in the submitted proposal. In addition, consideration will be given to cost and performance projections. Furthermore, the following criteria will be given considerable weight in the proposal selection process:

Bidder's performance history and alleged ability to timely deliver proposed services.

Bidder's ability to provide and deliver qualified personnel having the knowledge and skills required to effectively and efficiently execute proposed services.

Overall cost-effectiveness of the proposal.

The contract award will be based on "best value" that optimizes quality, fees, and efficiency among responsive and responsible bidders. Proposals deemed by the RFSUNY to satisfy the requirement set forth in this RFP will be evaluated for the awarding of a contract.

The Research Foundation's (RF) Procurement Policy provides exemptions for mandatory participation in competitive bids or proposals for contracts with the State of New York, Consortiums, or through campus central stores or Services Centers. As such, SUNY and SUNY affiliated institutions are not required to participate in the RFP Managed Services bid process. At the RF's discretion, the RF may engage with SUNY or SUNY affiliated institutions to evaluate the suitability and fit of SUNY provided IT Services that mirror some or all of the services outlined in the RFP process.

The RF Procurement Policy is located on the RF's public web page at:  
[http://www.rfsuny.org/media/RFSUNY/Policies/procurement\\_policy\\_pol.htm](http://www.rfsuny.org/media/RFSUNY/Policies/procurement_policy_pol.htm)

Questions regarding this policy should be directed to the RF's Finance office at:  
[rffinance@rfsuny.org](mailto:rffinance@rfsuny.org)

### RFP Process

#### Phase 1: Proposal Preparation & Submittal (5/29/18 – 7/6/18)

5/29/18 – Managed Services RFP Issued.

6/8/18 – Attachment A, APPLICATION FOR CONTRACT WITH THE RESEARCH FOUNDATION FOR THE STATE UNIVERSITY OF NEW YORK AND BIDDER CERTIFICATION due.

6/14/18 - Webinar Q&A 1 pm – 3 pm.

6/21/18 - Webinar Q&A 1 pm – 3 pm.

6/22/18 – Vendor inquiry period closes.

7/6/18 – Final proposals due.

#### Phase 2: Internal Review of Proposals (7/6/18 – 9/7/18)

The Research Foundation will conduct an internal review of all vendor proposals and select vendors for interviews and presentations.

Phase 3: Vendor Interviews & Presentations (9/7/18 – 11/9/18)

The Research Foundation will conduct on-site interviews and vendor presentations.

Phase 4: Vendor Selection & Contract Finalization (11/9/18 – 12/31/18)

The Research Foundation will select final vendor(s) and begin contract negotiations.

Attachment A

**APPLICATION FOR CONTRACT WITH THE RESEARCH FOUNDATION FOR THE STATE  
UNIVERSITY OF NEW YORK AND BIDDER CERTIFICATION**

PROGRAM TITLE: IT Managed Services

BIDDERNAME: (company):

BIDDER CONTACT NAME:

ADDRESS1:

ADDRESS2:

TELEPHONE: (     )     )

FAX NUMBER :(     )     )

E-MAIL ADDRESS:

**Compliance with RFP Conditions and State and Federal Laws**

I (we), the undersigned affirm the bidder is willing to comply with all the conditions set forth in this Request For Proposal and with all applicable laws of the State of New York and the Government of the United States.

**Willing To Contract**

I (we), the undersigned affirm the bidder understands that a separate contract will be established which will fully detail each party's responsibilities in relation to the services requested by this RFP.

I (We), the undersigned, attest that I am (we are) authorized to bind the bidder to the provisions of the attached proposal.

NAME AND TITLE OF INDIVIDUAL OR FIRM'S OFFICER AUTHORIZED TO SIGN CONTRACT:

(PLEASE PRINT OR TYPE)

DATE: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

NAME AND TITLE OF PROJECT DIRECTOR (IF DIFFERENT FROM ABOVE):

\_\_\_\_\_  
(PLEASE PRINT OR TYPE)

DATE: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

## Attachment B – IS Summary Job Descriptions

Associate: 1-3 year's experience  
 Intermediate: >3-7 year's experience  
 Senior: 7+ year's experience

Title	Description
Unix/Linux Administrator	Installs configures and maintains UNIX/ Linux operating systems. Analyzes and resolves problems associated with the operating system's servers, hardware, applications, and software. Detects, diagnoses, and reports UNIX related problems on servers.
Systems Administrator	Installs new software releases and system upgrades, evaluates and installs patches, and resolves software related problems. Performs system backups and recovery. Maintains data files and monitors system configuration to ensure data integrity.
Senior Network Engineer	Assists in the development and maintenance of network communications. Uses knowledge of LAN/WAN systems to help design and install internal and external networks. Tests and evaluates network systems to eliminate problems and make improvements
Help Desk Support	Provides support to end users on a variety of issues. Identifies, researches, and resolves technical problems. Responds to telephone calls, email and personnel requests for technical support. Documents, tracks and monitors the problem to ensure a timely resolution.
Desktop Support	Maintains, analyzes, troubleshoots, and repairs computer systems, hardware and computer peripherals. Documents, maintains, upgrades or replaces hardware and software systems. Supports and maintains user account information including rights, security and systems groups.
SharePoint Developer	The SharePoint Software Developer applies current graphics design and .NET technologies to develop, modify, maintain SharePoint server portals. Design, develop, and manage site content and capabilities and provide daily onsite maintenance of the existing MOSS portals
QA Analyst	Develops, publishes, and implements test plans. Writes and maintains test automation. Develops quality assurance standards. Defines and tracks quality assurance metrics such as defect densities and open defect counts
Oracle Operator	Operates and monitors computer equipment. Performs routine tasks to maintain computer equipment and their peripherals. Loads peripheral equipment such as tapes and printer paper for operating runs. Observes peripheral equipment and error messages displayed on monitor of terminal to detect faulty output or machine stoppage. Collects, reviews, and inputs data into a computer processing system; audits output data. May be expected to code data and input data for computer processing. Identifies and resolves production related errors. Maintains and revises procedural lists, control records and coding schemes to process source data.
DBA	Administers, maintains, develops and implements policies and procedures for ensuring the security and integrity of the company's Oracle database. Implements data models and database designs, data access and table maintenance codes; resolves Oracle database performance issues, database capacity issues, replication, and other distributed data issues
EBS Developer	Reviews, analyzes, and modifies the programming systems including encoding, testing, and debugging to support Oracle (ERP) applications. Ensures that software can be completely integrated into the ERP system. Designs new modules to improve system efficiency.
EBS/Java Developer	Designs develops and implements web-based Java applications to support business requirements. Follows approved life cycle methodologies, creates design documents, and performs program coding and testing. Resolves technical issues through debugging, research, and investigation
Workflow Administrator/Developer	Responsible for leading and directing the efforts of design, development, implementation, configuration, and maintenance of workflows and workflow processes for finance, supply chain, human resource, and customer relationship management modules for Oracle ERP.
BI Architect	The BI data architect defines and manages the data structures required to support the enterprise through the BI program. The data architect is a focal point for understanding data from the corporate perspective and representing the data so it can be understood uniformly throughout the company.
ETL Developer	The BI ETL architect determines the optimal approach for obtaining data from diverse source system platforms and moving it to the BI. This involves understanding all of the source system platforms, application architectures, and DBMSs. The person in this role designs and implements the infrastructure used by ETL specialists on specific projects.
BI Developer	The Business Intelligence Developer is responsible for aggregating data from multiple sources in an efficient data warehouse and designing enterprise-level solutions for very large multidimensional databases.
IT Security Administrator	Implements and manages IT security policies and procedures. Provides guidance on IT security best practices. Trains end users on IT security policies. Protects information through confidentiality, integrity, and availability.