



**Request for Proposal (RFP)**

**For**

**IT Managed Services**

**SMALL BUSINESS ASSOCIATION OF MICHIGAN**

**March 17, 2022**

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# **Introduction to the Small Business Association of Michigan (SBAM)**

## **Organizational Background**

The Small Business Association of Michigan (SBAM) is a 501(c)(6) not-for-profit, trade association organized for the exclusive interest and concern of small business in Michigan. SBAM's mission is to help Michigan small businesses succeed. SBAM has a wholly owned for profit subsidiary corporation known as Small Business Resource Center, Inc. (SBRC). Under SBRC there are three limited liability companies: an entity known as Small Business Insurance Services, LLC, which is responsible for insurance products and Small Business Administrative Services, LLC which manages COBRA and CDHP programs and MainStreet Legislative Consulting Services, LLC which offers association management services.

The roots of SBAM go back to 1967 when its founder was conducting a marketing and management refresher program for small business people in Kalamazoo and Holland. The program's discussions seemed to center around one central issue -- the difficulty of running a successful small business and the need for an organization that would represent only small business. In 1969, after two years of informal efforts, the Independent Businessman's Association was formed. While the intervening years have seen the organization's name change, its membership expand from a base in western Michigan to encompass the entire state, and its headquarters move from Kalamazoo to Lansing, one thing stays the same -- SBAM's commitment to serving its members and the state's small business community.

## **Who Joins SBAM?**

SBAM's membership is as diverse as Michigan's economy itself. From accounting firms to appliance stores, vintners to veterinarians, what unites SBAM's membership is the spirit of enterprise. Small business owners start their businesses because they believe they can do it better and that they can do something no one else is doing. The association currently serves over 30,000 members.

Requirements for joining the Small Business Association of Michigan are few. A company must have less than 500 employees and be a registered business in the state of Michigan. The typical member tends to be small with 20 or fewer employees. The membership includes sole proprietors and home-based businesses. Nearly all types of businesses are represented – retail, service, professional, construction, manufacturing, agricultural, etc. As a result our membership comes from across the state and across the spectrum of SIC codes.

## **Operation of SBAM**

The Small Business Association of Michigan is governed by a Board of Directors consisting of no more than 25 small business owners from around the state of Michigan. Internally, the Association staff is led by Brian Calley, President and CEO. Other staff contacts for managed services work are Ann E. Parker, Chief Operating Officer and Kelli Saunders, Executive Advisor and Director of Office Administration.

## **Do Not Confuse SBAM and SBA**

The Small Business Association of Michigan (SBAM) is a not-for-profit trade association funded by dues dollars and income from products and services and several other sources. The Small Business Administration (SBA) is an agency of the federal government.

For more information on the Small Business Association of Michigan, as well as our products and services please visit our website at [www.sbam.org](http://www.sbam.org).

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## **SECTION 1: PURPOSE**

### **1.1 Project Overview**

The purpose of this RFP and the selection process that will follow, is to obtain the services of a qualified managed services firm.

SBAM's fiscal year is July 1 – June 30.

### **1.2 Proposal Security**

Proposal responses will become the property of SBAM, as such information in each response will be shared with employees of SBAM, external consultants and/or other persons that will be involved in the evaluation. The proposal is not intended for public use or knowledge.

### **1.3 Exceptions**

Exceptions to any part of the requirements stated in this request must be clearly identified and documented as exceptions.

## **SECTION 2: SCOPE OF WORK**

### **2.1 General Description**

The Association currently has 28 employees working in a remote/hybrid environment. Approximately one-half of the team is full time remote, the other half works at the Association's physical location three days a week and from home two days a week. The physical location is 120 N. Washington Square, Suite 1000, Lansing MI 48933. We are located one block east of the Michigan Capitol building.

### **2.2 Network**

Employees are using Lenovo ThinkPad laptops, the oldest of which was purchased in October of 2019. The network is shown below in Appendix A. The list of laptops and other computers are shown in Appendix B.

The network is secured using the following tools and techniques:

- Anti-spam / Email Filtering
- Application Patching / Updates
- Configuration / Device Management
- Cyber Insurance Assistance & Support
- Data Backup and Recovery
- Edge Firewall
- Edge Security & DNS Filtering
- Intrusion Detection System
- Multi Factor Authentication

- OS Patching / Updates
- User Identity Management
- Application Control and Whitelisting
- Endpoint Detection and Response
- Endpoint Security & DNS Filtering
- Security Awareness Training

A current network diagram has been provided as Appendix A to this proposal.

### 2.3 Cloud Services

SBAM has made a conscious effort to move to cloud-based services.

The services are currently as follows. At the beginning of the engagement the partner should conduct an audit of the services and licenses and make recommendations.

#### Cloud Services:

- Microsoft 365 Hosted Email
- Microsoft 365 Hosted SharePoint

<b>Primary Office Software</b>	Utilizes primarily Office 365 “Premium” licenses with an Azure active directory add on
<b>File Storage</b>	Uses SharePoint for file storage
<b>Phones</b>	Phone service is provided by Call Tower, integrated with Microsoft Teams
<b>Back Up</b>	Exchange, OneDrive, SharePoint Current service is daily
<b>Fax</b>	There is one fax line coming in on an old, stand-alone fax machine. We are ending that service.

Onsite Equipment includes:

<b>Laptops</b>	Primarily Models: Lenovo Think Pads	Currently supporting 35 units
<b>Wireless Access Points</b>	Meraki MR32 and MR34 Soon to be replaced with two MR44	License Expiration – 8/12/2025

<b>Firewall</b>	Meraki MX 67 Network Protection Standard Support	Expires – August 2025
<b>Server/Domain controller</b>	Microsoft Azure Hosted Servers (x2)	Installed, January 2021.  Running Windows Server 2019
<b>Switches</b>	Cisco Catalyst 2960-X 48-port PoE	2 units
<b>UPS</b>	APC Smart UPS C1500VA Battery Backup	3 units
<b>Printer</b>	Toshiba Studio 4515ac	1 unit
<b>Printer</b>	Toshiba 2508A	1 unit
<b>Printer</b>	Xerox 3260	1 unit
<b>Printer</b>	Dell 2350dn	1 unit

## 2.4 Collaboration

SBAM enjoys a collaborative engagement with the current service provider. This includes monthly meetings, usually 60 – 90 minutes long, to review open tickets, any service issues, new initiatives on the horizon, etc. The current service provider also takes an active role in preparing an annual IT budget for the association and suggests long-range, future investments that the Association can make to maintain an efficient and secure network.

## SECTION 3: PROPOSAL SUBMISSION

Your proposal should be structured in the following manner:

- Executive Summary
- Vendor Response to RFP Questions (Answers to Section 5)
- Pricing Estimate
- References
- Appendices

### 3.1 Format and Media

You must provide an electronic version (PDF preferred) of your proposal.

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### 3.2 Key Dates

- RFP Issue Date: March 18, 2022
- Proposals must be received by April 4, 2022 at 5:00 p.m. EST

Your proposal must be received by **Jay Dennis** and **Ann Parker** before 5:00 PM EST. Any proposal(s) received after that time will be rejected.

Jay is located at:

Achurch Consulting  
[jay@achurchconsulting.com](mailto:jay@achurchconsulting.com)  
571-215-1726

Ann is located at:

Small Business Association of Michigan  
120 N. Washington Square, Suite 1000  
Lansing, Michigan 48933  
[ann.parker@sbam.org](mailto:ann.parker@sbam.org)

- Interview of finalists: week of April 18 - 22, 2022
- Target vendor selection date: no later than May 4, 2022
- Contract Start Date: August 1, 2022

## SECTION 4: VENDOR SELECTION PROCESS

### 4.1 Selection Process

- Proposals will be reviewed by a selection committee comprised of an external vendor SBAM has retained to assist with the managed services vendor selection process and two SBAM staff people charged with oversight of the Association's network. They are listed on page one of this RFP.
- The committee may select up to two finalists.
- The finalists will be asked to provide the external consultant and staff with a presentation of capabilities prior to selection.
- Onsite/virtual presentations for finalists will be scheduled. **Firms must be available the week of April 18 for this interview.**
- The final candidate will be selected.
- Scope of work will be finalized.
- Contract terms will be negotiated and agreed upon.

### 4.2 Selection Criteria

The following areas will be the primary factors in selecting a vendor:

- 
- Expertise – Does the firm have the experience, track record, knowledge, certifications, communication plan and resources to service SBAM, a non-profit trade association? Does the staff have the years of experience, qualifications, and certification needed
  - Resource Dedication –Is the firm able to demonstrate continuity of qualified staff to service our systems, network and applications?
  - Responsiveness – Does the firm demonstrate accessibility, responsiveness and flexibility to meet the needs of an active trade association?
  - Culture/Fit – Do we feel comfortable with all levels of firm personnel? Do we perceive a management commitment to a positive working relationship between your firm’s staff and the internal Association management?
  - Price – Is the firm committed to provide services at a cost-effective fee?
  - Level of engagement with SBAM – Is the firm a current member of the Small Business Association of Michigan or has the firm supported the organization in other ways through sponsorships or attendance at SBAM events.
  - Insight and knowledge on how to prepare for the future
  - Geographical location of the company office that will provide the services to SBAM.
  - Organization size, financial stability, industry record, and capacity to supply, install, and support the proposed services and requirements including the managerial, technical, and physical resources within the required time frame.

### **4.3 Vendor Questions**

Please provide brief responses to the following questions:

- a. When was your company established?
- b. Where is your company located?
- c. Is your company currently involved in any lawsuits or arbitration judgements that would have a significant adverse effect on its operations?
- d. Give us a brief explanation of why you would like to work with SBAM.
- e. Describe the services to be provided, including the approaches and methods to be used.
- f. What distinguishes your firm in the managed services business?
- g. Firm size and structure:
  - i. Please provide an organizational chart.
  - ii. Please provide brief bios, tenure with your firm and certifications (ITIL, Security+, Etc.), qualifications for the key staff members that may be involved with our accounts.
- h. How do you structure pricing for clients like SBAM for the services required in this RFP? Include details of standard on-site and remote hourly prices and after hour support rates for each tier of engineer. This may be included in the detail of the Pricing Estimate.



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- i. Address how your firm will affect a seamless transition from the Association's existing provider, if such a transition occurs.
  - j. Description of your account management structure and communication cadence (weekly, monthly, quarterly meeting, online portal, etc.)
  - k. Explain your firm's philosophy on communications with clients throughout the year.
  - l. Provide an SLA matrix for High, Medium and Low impact requests with High, Medium, Low urgency. Include response times and resolution objectives for each.
  - m. Please provide: a copy of a standard engagement and maintenance contract(s), sample monthly report, any other terms & conditions

#### **4.4 Help Desk Questions**

- a. Please describe your overall approach and process for standard help desk support for a client of this size.
- b. What tools are used to record and track service request? Will SBAM have access to view service request and their status with this tool?
- c. Is helpdesk support via the support channels unlimited?
- d. What support channels are offered? (e.g. Phone, IM/Chat, Tickets)
- e. What are the hours of operation? (Standard and after hours)
- f. How many help desk agents on the team?
- g. Do you have tiered support? If so, please describe and provide the current staffing level for each.
- h. What's the skill set of the current team? (Certifications? Areas of expertise?)
- i. What's the average tenure of your agents?
- j. What type of continuous training do you offer your agents?

#### **4.5 References**

Please provide at least three (3) similarly sized client references that we may contact.

For each reference, include the following:

- Contact Name
- Contact Title
- Contact Phone Number
- Company Name
- Company Address
- Years of Service Provided

#### **4.6 Questions**

Inquiries about this RFP should be directed to Jay Dennis, Achurch Consulting at [jay@achurchconsulting.com](mailto:jay@achurchconsulting.com),

Cell: 571-215-1726

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## **SECTION 5: OTHER INFORMATION**

Please identify any real or perceived conflict of interest that may exist if the proposal is accepted.

SBAM reserves the right to reject proposals received in response to this RFP, to engage in additional discussions with one or more vendors, and to issue amendments to the RFP based on initial submissions.

SBAM shall not be liable for any costs incurred in preparing the RFP response and shall not be responsible for any pre-contract costs incurred by interested vendors participating in the selection process.

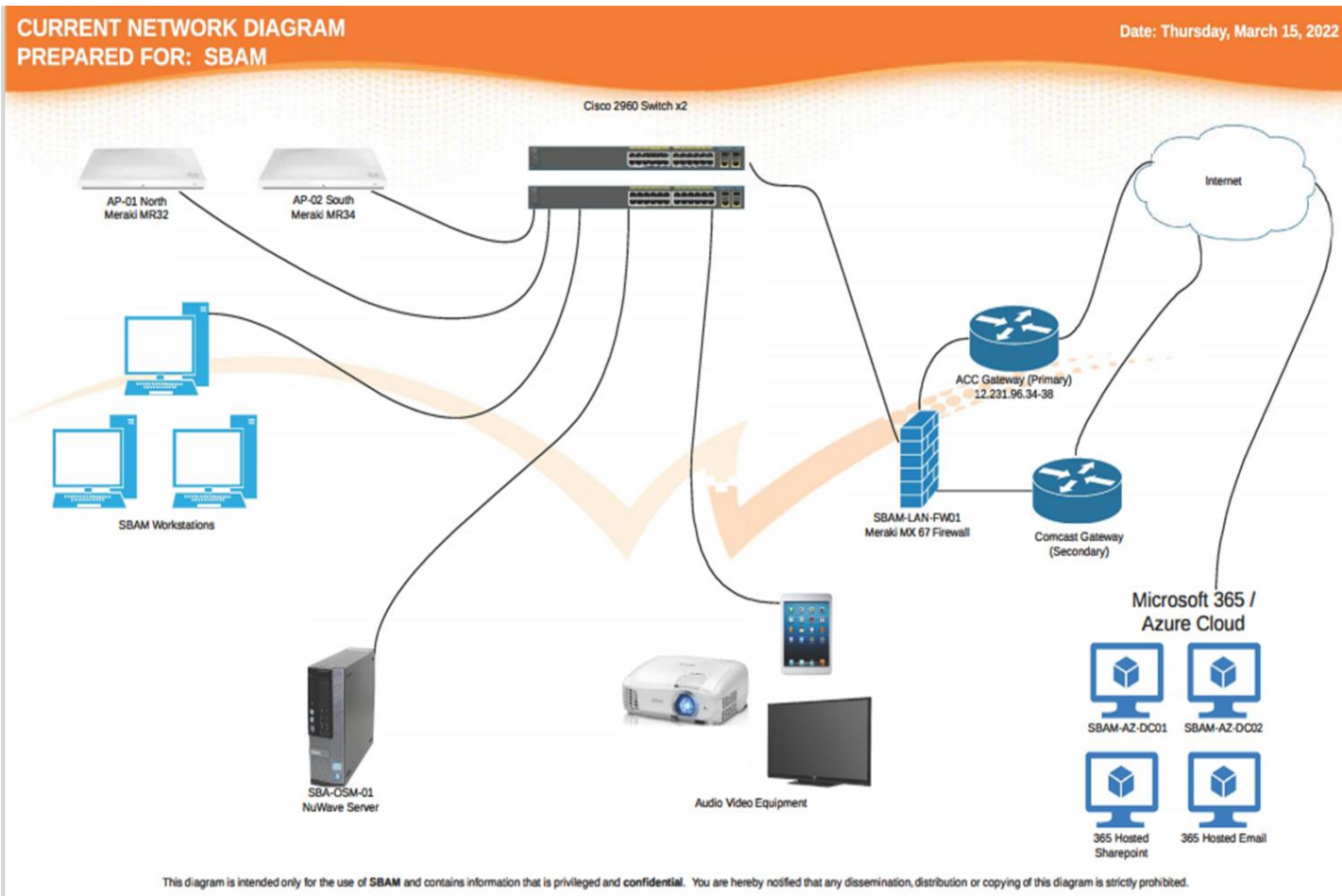
SBAM intends to enter into a written agreement with the successful vendor(s). The terms and conditions of such an agreement are subject to negotiation. Work will begin after negotiations are complete and all parties sign the contract.

Upon conclusion of the selection process, SBAM will notify, all vendors submitting proposals in response to this RFP.

# Appendix A

## CURRENT NETWORK DIAGRAM PREPARED FOR: SBAM

Date: Thursday, March 15, 2022



This diagram is intended only for the use of SBAM and contains information that is privileged and confidential. You are hereby notified that any dissemination, distribution or copying of this diagram is strictly prohibited.

## Appendix B

Make	Model	Serial #	ID Tag	Speed	Ram	HD	Purch.	Expired	Warranty
Lenovo	ThinkPad Notebook	PF38XGY6	I-0001037		8GB	256GB	1/19/2022	1/19/2025	3 years
Lenovo	ThinkPad Notebook	PF38ZM03	I-0001038		8GB	256GB	1/19/2022	1/19/2025	3 years
Lenovo	Thinkpad E5560	PF0NLW\$5	I-00001104	2.4 GHz	12GB	500GB	4/13/17	4/13/22	1 year
Lenovo	ThinkPad Notebook	PF37PBJY	I-0001036		8GB	256GB	1/19/2022	1/19/2025	3 years
Lenovo	ThinkPad Notebook	PF38YQLL	I-0001034		8GB	256GB	1/19/2022	1/19/2025	3 years
Lenovo	ThinkPad Notebook	PF35VAF	I-0001035		8GB	256GB	1/19/2022	1/19/2025	3 years
Lenovo	Thinkpad T580	R50W5WKD	I-0001012	1.70GHz	8GB	300GB	10/19/19	10/19/22	3 years
Lenovo	Thinkpad T580	R50W5WKG	I-0001009	1.70GHz	8GB	300GB	10/21/19	10/21/22	3 years
Lenovo	Thinkpad T580	R50W5WK5	I-0001010	1.70GHz	8GB	300GB	11/19/19	11/19/22	3 years
Lenovo	Thinkpad T580	R50WA28H	I-0001014	1.70GHz	8GB	300GB	10/19/19	10/19/22	3 years
Lenovo	ThinkPad Notebook	PF3511 \$8	I-0001032		8GB	256GB	1/19/2022	1/19/2025	3 years
Lenovo	Thinkpad X1 Carbon	PF15MG\$5	I-000-1011	1.90 GHz					
Lenovo	ThinkPad L14 Gen 1	PF28HFMK	I-0001025	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF242ARR	I-00010	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28G4HB	I-0001024	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28H28D	I-0001028	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28HCHC	I-0001015	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28G23L	I-0001027	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF2H0YAR	I-0001018	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28HLK6	I-0001019	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28HDSR	I-0001023	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28G0JQ	I-0001020	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPadP15s Gen 2	PF38GG8Z	I-0001031		32GB	1 TB SSD	1/13/22	1/13/25	3 years
Lenovo	ThinkPad L14 Gen 1	PF28GVBN	I-0001029	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28GXFA	I-0001016	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28GPYG	I-0001026	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28E9LK	I-0001021	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Dell	Latitude E5570	9P8HTF2	I-00010002	2.4 GHz (x4)	16 GB	1TB	1/31/17	1/22/20	3 years
Lenovo	ThinkCentre M710s	MJ06TWRJ	I-0001004	3.00GHz	8GB	237GB	9/9/18	4/21/21	3 years
Lenovo	ThinkCentre M710s	MJ06TWRK	I-0001006	3.00GHz	8GB	237GB	4/21/18	4/21/21	3 years
Lenovo	ThinkCentre M710s	MJ06TWRN	I-0001005	3.00GHz	8GB	237GB	4/21/18	4/21/21	3 years
Lenovo	10S10003US	MJ09PK5E	I-0001013	3.0 GHz				10/19/22	
Lenovo	M920x Deektop (ThinkCe	MJ09QRVR	I-0001011	3.00GHz	8GB	300GB	10/19/19	10/19/22	3 years
Lenovo	10S10003US	MJ09QRVY	I-0001008	3.0 GHz				10/19/22	
Lenovo	ThinkPad L14 Gen 1	PF28H35Q	I-0001017	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	ThinkPad L14 Gen 1	PF28HDS1	I-0001022	1.6GHz	8GB	256 GB	9/9/20	9/9/23	3 years
Lenovo	Thinkpad E580	PF12TJWE	I-00010006	1.8GHz	8GB	237GB	4/21/18	4/21/21	3 years
Lenovo	Thinkpad 20L9001KUS	R50RAPWK	I-0001007	1.70GHz	8GB	238GB	10/3/18	10/3/19	1 year
Lenovo	Thinkpad E5560	PF0NL3KZ	I-00001105	2.4GHz	12GB	500GB	4/13/17	04/13/22	1 year
Lenovo	ThinkCentre M710s	MJ06TWRR	I-0001003	3.00GHz	8GB	237GB	4/21/18	4/21/21	3 years
Lenovo	ThinkCentre M710s	MJ06TWRK	I-0001006	3.00GHz	8GB	237GB	4/21/18	4/21/21	3 years
Lenovo	ThinkCentre M710s	MJ06TWRM	I-0001002	3.00GHz	8GB	237GB	4/21/18	4/21/21	