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1 Request for Proposal (RFP)

Family Service Toronto (FST), one of the city’s leading social service organizations, invites prospective Proponents to respond to this Request for Proposal (RFP) for the provision of IT Technical Support Services on an as-and-when required basis.

FST will select a single organization for an initial contract term of one year, effective May 1, 2017 and ending April 30, 2018 with the possibility of renewal for a longer term as of May 1, 2018.

FST will identify Assignments during the overall contract term and work with the successful Proponent to define a scope of work and set of deliverables.

Each Assignment will require a statement of work with a specific start and end date and payment terms and schedule for services provided.

2 Introduction to Family Service Toronto

Family Service Toronto is one of the city’s leading non-profit social service organizations and has been providing critical and pioneering work in counselling, advocacy and support to individuals and families for more than a century.

More than 26,000 people benefit from FST’s services annually, and many of them are among the most vulnerable and marginalized in Toronto. Others come to FST for one-of-a-kind expertise, resources and community learning. FST’s programs and services improve lives, remove barriers and reduce future challenges for children, women, men, seniors and youth. This results in:

- Women and seniors living free of violence
- Adults and children with intellectual disabilities living independently
- Seniors living with dignity in their homes and communities
- Reduced stress for divorcing/separating families
- Lesbian, gay, bisexual and transgender (LGBTQ) people and LGBTQ-led families finding responses to their unique challenges
- Improved communities for new Canadians
- Political change that recognizes the value of all members of our community.

FST currently operates 28 community programs across several units including:

**Changing Lives** - Counselling, education seminars and support for individuals and families coping with issues including separation/divorce, depression, sexual orientation and senior care.

**Family Violence** - Individual and group counselling for people experiencing abuse.

**Social Action and Community Building** - Community development, research, public education and advocacy work focused on the systems and institutions that shape the lives of residents.

**Options & Passport** - Support services for individuals with intellectual disabilities and their families.

Family Service Toronto provides service through 12 locations across the city and is connected to a myriad of ethno-cultural communities through membership and participation in more than 70 organizations and associations, including newcomer and settlement agencies. FST’s programs and services reach into these communities through everyday grassroots contact with individuals and groups seeking counselling or assistance to deal with social problems. Programs and services are available across a spectrum of 22 languages.
Family Service Toronto is a member agency of United Way Toronto and York Region and a registered charity under the Canada Revenue Agency (Registration no.: 107376063RR0001).

In 2015-16, FST's operating budget was $12.1 million, excluding $28.1 million in client purchase of service agreements which FST administers on behalf of the Government of Ontario and partner agencies. These clients are mostly individuals with a developmental disability, or their families, and they use the funds to purchase services to live independently and improve their quality of life. Purchase-of-service clients also include seniors living in supportive housing and who experience a range of mental health and physical challenges.

3 Overview of Current Technical Environment

FST has a small IT team with a full-time
- Director of Technology and Communications
- Systems Administrator

FST's current technical environment consists of:
- Approx. 160 staff and more than 100 volunteers, students and trainees
- Three major sites in Toronto and nine satellite locations
- 160 Windows PCs/laptops (most of them are on recently updated hardware)
- 50 on premise servers (many of them are approaching end of warranty/support)
- SysAid Helpdesk
- Office 365 email and office tools
- Outsourced Internet and phone services
- Outsourced data backup services
- Several externally-hosted business application servers

FST will move its administrative and core counselling operations from its current west-end site at 128A Sterling Road back to its redeveloped downtown Church Street site in early 2018.

4 Service Requirements

The following areas are current priorities for FST and will require assistance through assignment of a separate statement of work during the contract term:

- **Technical (Help Desk) Support** - Respond to user incidents/requests via online ticketing Help Desk, including support for remote users. Will require short-term onsite daytime (9-5) support during vacations/absences by FST's Systems Administrator. Ability to escalate technical support issues for additional expertise/consulting.
- **Desktop Applications Management** - Deployment of desktop application management tool that allows effective inventory, monitoring and resolution of user software issues with remote sessions.
- **Business Applications Management and Support** - Migration of on premise and cloud-managed business applications (ERP, CRM, case management, fax, data capture and document management systems) to cloud-based environment with ongoing monitoring and support.
- **Network Monitoring** - Monitoring of network with proactive communication tools and escalation protocols based on the severity of any unscheduled outages.
- **Technology Strategy Planning** - Consulting on network/data storage solutions, future infrastructure needs/design, cloud migration and technology trends in advance of 2018 central office move to downtown site.
- **IT Policy Review and Development** - Providing assistance for updating of customized policies related to the use of technology, disaster recovery and business continuity.
5 Selection Criteria
FST will use multiple criteria to select the most appropriate partner. Respondents are encouraged to be as aggressive and creative as possible in their proposals. The following list summarizes the major qualitative areas that will be evaluated.

- Industry expertise and experience
- Demonstrated customer service quality and support
- Previous relevant experience
- Vendor strength and stability
- Account management
- Reporting capabilities
- Financial considerations

6 Response Contents and Format
Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Your response to this RFP will serve as the basis for the consideration of your potential as a partner.

7 Information Requirements
For the purposes of understanding more about your company and your ability to successfully fulfill this important requirement, please provide the information below as part of your response, clearly referencing each specific question.

7.1 Corporate Information
1. Give a brief overview of your organization’s involvement in providing IT value added services in the marketplace.
2. How long has the organization been in this business and what is your current market share?
3. Indicate the number of employees in your organization. How many of those are dedicated to account management and/or technical support?
4. How many are full-time vs. contract?
5. Please describe your relationships and experience with manufacturers and major distribution partners in the Canadian technology marketplace.
6. What differentiates your organization from your competitors in the marketplace and how will this be relevant to us?
7. Will you subcontract any components of the proposed solution to third party organizations? If so, please describe the components to be subcontracted and provide details of any agreement in place with the subcontracted firm/individuals as well as a summary of past work that you have successfully completed together.
8. Please describe your organization’s experience in transitioning clients to public or private cloud technology from more traditional IT service models.
9. Please provide details of three current customer accounts that are similar in scope and requirements.

7.2 Proposed Approach and Solution
1. Please provide a proposed work plan for a migration to your organization as our preferred technology support services vendor. Specifically, provide the following information:
   i. Key activities
   ii. Timing
iii. Information/resource requirements from FST
iv. Deliverables
v. Key milestones, checkpoints, and other decision points

2. If we elect to move forward with your organization, what resources from us would you require during the migration and on an ongoing basis?

3. Please identify the team that will be assigned to the account and describe how you plan to interact with us and any third-party providers that may provide services.

7.3 Financials

1. Please indicate the charges associated with each of the following services in Canadian dollars, including the key driver of each cost and whether it is included in a standard per-unit cost vs. charged on an ad hoc basis.
   a. Technical (Help Desk) Support
   b. Desktop Applications Management
   c. Migration/Management (Cloud) of Business Applications
   d. Network Monitoring
   e. Technology Strategy Planning
   f. Implementation Planning and Guidance
   g. Life Cycle Management of Hardware Units

2. Do you offer service bundles and if so, describe the effect of this bundling on pricing.

8 Communications and Response

Please direct all inquiries related to this RFP to:

Brian Porter
Director of Technology and Communications
Family Service Toronto
brianpo@familyservicetoronto.org

9 Notification of Intent to Respond and Clarification Questions

Please indicate your intention to respond, by email, to the above email address by the Intent to Respond and Questions Due date outlined in the Key Dates table below. In addition, please provide the contact details of the individual responsible for coordinating your RFP response. At the same time, we ask that you submit any clarification questions regarding the RFP. Answers will be provided to all respondents by the Answers Provided date.

10 Response Delivery Instructions

Please submit an electronic copy of your proposal to the email address indicated in the Communications and Response section above. All responses must be received on or before close of business (5 p.m. EDT) on the Proposals Due date indicated in the Key Dates table below.

11 Vendor Interviews

Our intention is to hold interviews with one or more firms on the Presentations dates indicated in the Key Dates table below. The interviews will be held at our Sterling Office and we will provide the successful firms with as much advance notice as possible.
12 Key Dates

<table>
<thead>
<tr>
<th>Event</th>
<th>RFP Issued</th>
<th>Intent to Respond &amp; Questions Due</th>
<th>Answers Provided</th>
<th>Proposals Due</th>
<th>Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Mon. March 20</td>
<td>Mon. March 27</td>
<td>Wed. March 29</td>
<td>Wed. April 12</td>
<td>Thurs. April 20</td>
</tr>
<tr>
<td>Time</td>
<td>5 p.m. EDT</td>
<td>5 p.m. EDT</td>
<td>5 p.m. EDT</td>
<td>5 p.m. EDT</td>
<td>TBD</td>
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13 No Obligation
The submission of a proposal shall not in any manner oblige FST to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.

14 No Guarantee
FST makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.