

## RFP 2025-002

### IT Managed Service Provider(s)

#### Questions and Answers

1. *Section 4 refers to needing to 'lead and manage upgrades and migrations'. Is EmployIndy's position that the selected provider would include engineer level services as needed to upgrade and migrate configurations on all current technologies (firewalls, switches, servers, virtual infrastructure, etc?) under a monthly contract?*
  - a. Upgrades and migrations are not included under the monthly contract services. Instead, they will be scoped separately and paid for as individual projects. The annual budget range of \$150K-\$250K does not account for these upgrades or migrations.  
Routine patching, firmware updates, and operating system updates necessary for maintaining system stability and security are expected to be included in the monthly managed services contract. However, major version upgrades, infrastructure migrations, and reconfigurations requiring engineering-level work will be handled as separate projects.  
Historically, EmployIndy has not required major infrastructure migrations as part of its managed services agreement. However, we do have a significant network refresh and server upgrade planned within the next year, which will be addressed through separate statements of work.
2. *How many EmployIndy staff members are authorized to directly request technology changes from the awarded provider?*
  - a. There is a single point of contact at EmployIndy for requesting changes from the awarded provider(s) (IT Director or – if that role is vacant – EVP, Finance + Administration), but many different EI leaders and staff may engage in discovery activities with the awarded provider(s) to define and scope changes.
3. *Does EmployIndy have any immediate or forecasted plans to hire any internal technology specific staff members?*
  - a. Only one staff is currently budgeted internal to EmployIndy, and it would be an IT Director reporting to the EVP, Finance + Administration.
4. *Does EmployIndy have a documented data strategy for how they use their KPIs and other business specific data points?*
  - a. EmployIndy does not have a formal, documented data strategy. Instead, our leadership follows an evolving approach that has resulted in some inconsistency in data collection and transformation. We track key KPIs monthly using dashboards and report them quarterly to our Workforce Development Board and select funders. We aim to formalize our strategy

during the transition, but major enhancements would depend on securing additional grant funding.

5. *What is your current software procurement strategy?*
  - a. EmployIndy's software procurement is now centralized under IT leadership as part of an ongoing application rationalization effort. IT and Finance—both reporting to the EVP, Finance + Administration—collaborate closely, with purchase orders requiring procurement and finance signoff above specific thresholds. We follow a Microsoft-first approach to leverage nonprofit discounts, standardizing on Microsoft Office and Microsoft CRM, while planning to transition custom apps from Airtable to Microsoft Power Apps. Overall, our strategy is reactive and cost-focused, and while we use vendor tools for software asset management, license tracking is managed through budget spreadsheets given our modest volume.
  
6. *And will the awarded vendor be responsible for all software procurement to effectively audit and manage license assignments?*
  - a. No, the awarded vendor will not be responsible for all software procurement. While they are expected to support and enhance the auditing and management of license assignments—using specialized tools and methodologies—the overall procurement process remains centralized under EmployIndy's IT leadership and Finance. Procurement decisions, including purchase order requisitions and vendor signoffs, continue to be managed internally.
  
7. *Regarding the request to “establish and manage a data governance framework, including clear rules and policies”. Will EmployIndy be providing the administrative and legal inputs needed to establish the framework, or will the selected vendor need to gather that from the EmployIndy business units?*
  - a. EmployIndy will provide foundational administrative and legal inputs for the data governance framework. However, the selected vendor will be expected to work with EmployIndy departments to gather additional requirements and ensure the framework fully addresses operational, regulatory, and compliance needs.
  
8. *Regarding the request to “Establish and maintain a BCDR (Business Continuity, Disaster Recovery) plan, including risk assessment and BIA (Business Impact Analysis).” Will EmployIndy business units provide personnel to participate in BIA and assessment activities such as interviews, questionnaires, and structured discussions to determine business impact?*
  - a. Yes, EmployIndy will provide key personnel from our departments to participate in the BIA and risk assessment activities. While the vendor will lead and conduct the interviews, questionnaires, and structured

discussions, we will ensure the necessary internal support is available to deliver comprehensive business impact data.

9. *Regarding the provision to “Work on application portfolio consolidation to reduce redundant applications in our Environment”, [Proposing vendor] sees this as a hard prerequisite to establishing a data governance framework and a BCDR. Is EmployIndy prepared to centralize application control prior to beginning the BCDR and Data Governance initiatives?*
  - a. EmployIndy is currently undergoing an application rationalization process and is moving toward centralized application control. We recognize that having a consolidated application environment is essential for establishing a robust data governance framework and BCDR plan. While the process is ongoing, we are prepared to prioritize centralizing key applications before fully launching our Data Governance and BCDR initiatives.
  
10. *Section 4 refers to needing to ‘lead and manage upgrades and migrations’. Is EmployIndy’s position that the selected provider would include engineer level services as needed to upgrade and migrate configurations on all current technologies (firewalls, switches, servers, virtual infrastructure, etc?) under a monthly contract?*
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11. *Data Management in section 4 also mentions “develop” several times in conjunction with PowerBI and API. Does this mean EmployIndy is requesting custom software development services associated with those two technologies?*
  - a. We are not asking for full-scale custom software development. Existing PowerBI visualizations and APIs are maintained as part of the monthly managed services. However, if new PowerBI visualizations or new APIs are needed, those enhancements would be scoped separately and billed as additional projects.

12. *What is your typical monthly volume of change requests/customizations for Dynamics?*

- a. EmployIndy does not have a consistent monthly volume of change requests or customizations for Microsoft Dynamics CRM. Instead, requests arise on an as-needed basis, typically driven by specific projects rather than ongoing system enhancements.

The majority of support tickets relate to functionality issues such as file viewing, saving, or general troubleshooting. Customization requests are infrequent and primarily focus on workflow improvements, data management adjustments, or reporting enhancements.

Most requests are submitted through representatives from the Contracts/Business Development team and the Business Analyst for programs, with a focus on ensuring system usability and resolving operational challenges rather than implementing frequent customizations.

13. *Do you have any planned major modifications or new functionality needs in the next 12 months?*

- a. Yes, EmployIndy is planning a major network refresh and server upgrade within the next 12 months, which includes migrating from physical to virtualized environments. We are also actively engaged in an application rationalization process to consolidate redundant applications—including moving current custom apps from Airtable to Microsoft applications such as Power Apps and SharePoint. Lastly, we expect the service provider to review Microsoft CRM, PowerBI and Azure data warehouse to determine if any major modifications need to be made in order to enhance its usability and supportability going forward. Beyond these initiatives, no additional major modifications or new functionality needs are anticipated at this time.

14. *Who currently handles Dynamics development work and what will happen to in-flight projects?*

- a. Currently, Business Analysts acts as interim liaison for most projects in collaboration with the Grants and Contracts Manager for troubleshooting and projects pertaining to Dynamics.

15. *Please provide examples from the past three months of Dynamics-specific support tickets.*

- a. 404 Error for viewing files within Dynamics and contract approvals have been the most frequent support ticket requests.

16. *Are there specific peak periods or cyclical needs we should be aware of (e.g., end of quarter reporting)?*

- a. For infrastructure services, there aren't typically cyclical needs. We have a major event on Wednesdays at our WorkOne location that may require deskside support. The beginning of the school year can be busier for our

Jobs for America's Graduates teams as they start new classes. There isn't anything else that sticks out as a busier time of year than others for our IT services.

*17. What level of documentation exists for your current customizations and processes?*

- a. Documentation for current customizations and processes in Microsoft Dynamics CRM is limited and varies in detail. There is no comprehensive, centralized documentation covering all customizations, workflows, or integrations.

The selected vendor will need to assess existing documentation, identify gaps, and support the development of clear, structured documentation to improve system understanding, troubleshooting, and future enhancements.

*18. Are there any compliance requirements (beyond FERPA mentioned) that affect data handling?*

- a. Beyond FERPA, vendors should be mindful of compliance requirements tied to the Workforce Innovation & Opportunity Act (WIOA) and other relevant federal, state, and local regulations that impact workforce development data. Additionally, as a federal, state and local government funded organization, EmployIndy and its vendors have a number of grant compliance requirements to align with.

*19. What is driving the need to review security roles - any specific incidents or concerns?*

- a. The review of security roles is driven by a proactive approach to optimize access control and enhance data security—not by any specific incident. Our current configuration has evolved over time, resulting in inconsistencies that may not fully enforce the principle of least privilege. This review is intended to align security roles with best practices, ensuring sensitive data is appropriately protected and operational needs are met.

*20. What is your current training process for new Dynamics users?*

- a. The training process for new Microsoft Dynamics users is role-dependent, as each team utilizes the CRM for different purposes. Employees working within Programs receive training from the Business Analyst. Those in Business Partnerships or employer relations roles are trained within their team, often led by the Director. Internal Grants and Contracts users receive training under the guidance of their team's Director. Training is typically hands-on and tailored to the specific functions and needs of each role within the organization.

21. *How many new users typically need to be onboarded each month/quarter?*
- a. EmployIndy has typically hired 5-6 new employees per quarter over the last year. That being said, EmployIndy will go through a contraction this year with a major reduction in federal funding. So we expect to have a much lower volume, barring any major staff turnover.
22. *Can you provide more detail on the API needs for school database integration?*
- a. This API would be a separate project based on needs still being gathered.
23. *Are there any known issues with current integrations (Teams, Excel Online, SharePoint, etc.)?*
- a. SharePoint is being used as both a collaborative space and a data source (Lists) which is not ideal for metric reporting. Would like a more robust option for reporting.
24. *What is your data backup/recovery process for Dynamics?*
- a. EmployIndy's Microsoft Dynamics CRM ("The Engine") operates within the Microsoft Commercial Cloud, which provides built-in data backup and recovery features. Our current backup and recovery process includes:
    - Microsoft's Standard Retention Policies – Data is backed up automatically as part of Microsoft's cloud infrastructure.
    - Point-in-Time Recovery – Ability to restore data from snapshots within Microsoft's retention period.The selected vendor will be expected to review, optimize, and document backup and recovery strategies to ensure business continuity and compliance with data governance policies.
25. *Do you have any regular data imports/exports that need to be maintained?*
- a. EmployIndy exports specific reports from external sources and uploads them as flat files to Fabric monthly for metrics reporting. These reports are processed through a Spark Notebook for transformation.
26. *Are there separate budgets available for projects vs. ongoing support?*
- a. Yes, there are separate budgets. The ongoing managed services contract—ranging from \$150K to \$250K per year—covers routine support and maintenance. Major projects or special initiatives, such as significant upgrades, migrations, or other one-time work, are not included in that contract and would be scoped and funded separately. As with all things in nonprofit organizations, funding for projects is dependent on available grant funds and prioritized operational needs.
27. *What internal resources will be available to work with the support team?*
- a. EmployIndy will provide designated internal liaisons to support the vendor's work. Although we do not have a full in-house IT staff, our IT Director —

including oversight from the EVP of Finance + Administration — and key department representatives will be available to guide the process, participate in project activities, and facilitate communications. Additionally, subject matter experts from relevant departments will support specialized initiatives such as data governance, BCDR, and application rationalization as needed.

*28. How is this effort currently being staffed?*

- a. EmployIndy does not have a dedicated in-house IT staff for these services. Instead, IT strategy and oversight are managed by leadership under the EVP of Finance + Administration, with support from designated internal liaisons across key business units. The awarded vendor is expected to supply the technical expertise and staffing necessary for day-to-day IT operations and support. We consider this a nearly fully outsourced model for both infrastructure services and application services.

*29. Do you have a Managed Services Provider currently rendering these Services? If yes, do you anticipate retention of any of the staff that support current scope?*

- a. Yes, EmployIndy currently engages a Managed Services Provider for certain IT services. As part of the transition process, we will evaluate whether to retain any of the current provider’s staff. Retention will be considered on a case-by-case basis to ensure their expertise aligns with our future needs, but no firm commitments have been made at this time. But the EmployIndy contracts with our managed service providers do not outline a process for retaining contract staff after transition.

*30. Of the list of applications in scope, is there a delineation of which one fully belong to Infrastructure Services vs Application Services in terms of maintenance and support?*

- a. This question assumes a separation of infrastructure services and application services into two providers or more. If that were the case, the table below outlines how EmployIndy would expect the services to separate and level of support to provide. EmployIndy is willing to negotiate and realized there is often overlap of support between the service providers.

| <b>Application</b>            | <b>Responsibility</b>   | <b>Level of Support</b>  |
|-------------------------------|-------------------------|--|
| <b>Important Applications</b> |                         |  |
| Microsoft Dynamics CRM        | Application Services    | Full Support (comprehensive management, customization, integration, and maintenance) |
| SharePoint                    | Infrastructure Services | Full Support (configuration, integration, and ongoing management)                    |

| Application                      | Responsibility          | Level of Support   |
|----------------------------------|-------------------------|--|
| Teams                            | Infrastructure Services | Full Support (configuration, integration, and ongoing management)            |
| Smartsheet                       | Application Services    | Moderate Support (periodic support and configuration management)             |
| WordPress                        | Application Services    | Moderate Support (support for hosting, updates, and migration planning)      |
| Zoom (Phones)                    | Infrastructure Services | Full Support (configuration, integration, and ongoing management)            |
| Boardable                        | N/A                     | Discontinuing use in June 2025   |
| Adobe Applications               | Infrastructure Services | Moderate Support (license management, installation, and updates)             |
| Netsuite                         | Application Services    | Basic Support (installation and connectivity checks)                         |
| Paylocity                        | Infrastructure Services | Moderate Support (basic administration and troubleshooting)                  |
| Airtable                         | Application Services    | Full Support (configuration, integration, and ongoing management)            |
| Zapier                           | Application Services    | Basic Support (configuration and connectivity maintenance)                   |
| Azure                            | Infrastructure Services | Full Support (core infrastructure management and monitoring)                 |
| Fabric                           | Application Services    | Full Support (critical data management and integration)                      |
| Power BI                         | Application Services    | Full Support (comprehensive support for existing dashboards and maintenance) |
| <b>Limited User Applications</b> |                         |  |
| Dropbox                          | Infrastructure Services | Basic Support (ensuring availability and basic connectivity)                 |
| Google Drive                     | Infrastructure Services | Basic Support (installation and basic troubleshooting)                       |
| Loom                             | Infrastructure Services | Basic Support (minimal support for functionality in supported browsers)      |



| Application  | Responsibility          | Level of Support   |
|--|-------------------------|--|
| Signal Vine  | Infrastructure Services | Basic Support (limited support for connectivity and usage)             |
| Canvas/Jobvite   | Infrastructure Services | Basic Support (installation and basic operational support)             |
| Box.com  | Infrastructure Services | Basic Support (ensuring functionality in a supported environment)      |
| Articulate 360   | Infrastructure Services | Basic Support (installation and basic usage support)                   |
| Tovuti   | Infrastructure Services | Basic Support (minimal support to ensure functionality)                |
| <b>Tools Managed by Current Infrastructure Services Vendor</b> |                         |  |
| Armorpoint   | Infrastructure Services | Full Support (dedicated management as part of security infrastructure) |
| CyberReason  | Infrastructure Services | Full Support (comprehensive security management)                       |
| ESET Management Agent  | Infrastructure Services | Full Support (active management and monitoring)                        |
| Cynomi   | Infrastructure Services | Full Support (full lifecycle management)                               |
| Fortinet   | Infrastructure Services | Full Support (continuous security management and updates)              |
| AssetTiger   | Infrastructure Services | Full Support (full asset management and monitoring)                    |
| Mimecast   | Infrastructure Services | Full Support (complete email security and continuity management)       |
| Hook Security  | Infrastructure Services | Full Support (dedicated security oversight)                            |
| ConnectWise  | Infrastructure Services | Full Support (comprehensive help desk and IT service management)       |
| Veeam  | Infrastructure Services | Full Support (full backup and recovery management)                     |
| Wasabi   | Infrastructure Services | Full Support (continuous cloud storage management)                     |

## Categories of Support Defined:

- **Full Support:** Active, ongoing management including proactive monitoring, configuration, troubleshooting, and integration.
- **Moderate Support:** Regular administration and maintenance with periodic troubleshooting and configuration adjustments.
- **Basic Support:** Minimal support, primarily ensuring installation, connectivity, and functionality in a supported environment.

This table reflects our general expectations, though exact support levels may be further refined during the transition process.

- 31. Should an MSP decide to bid on only one of the two Services, is the maximum budget expected to be divided between the two Service Providers?*
  - a. Yes.
- 32. The max budget allocated do not seem to align with the full scope of Services. Do you anticipate any budget allocation revisions?*
  - a. EmployIndy's budget for ongoing managed services is set at \$150K-\$250K per year, which aligns with our current financial constraints. Major projects, including upgrades, migrations, and new initiatives, are funded separately on a case-by-case basis. Today, we also pay for a number of tools separately on a monthly basis. While we do not anticipate increasing the allocated budget for core managed services, we remain open to evaluating cost-effective solutions that ensure critical needs are met within our financial parameters.
- 33. Would you entertain a proposal that may exceed the budgeted funds, in order to fully deliver the Services in scope?*
  - a. Yes, dependent on what is included in the scope.
- 34. With the notice of contract award and negotiations expected to begin on March 31st, 2025, are you able to confirm when the actual contract execution is expected to begin?*
  - a. Contract execution would be in April.
- 35. What platform and technology was used to build the Talent Bound Portal application? Is the cost for re-write of this portal consider part of the base price or an addendum?*
  - a. The Talent Bound Portal application was built using Microsoft Power Portal and Microsoft Pages and is connected to Microsoft CRM for data storage. Specialized views for external parties are manually input by EI staff. The re-write of the portal can be done using a monthly pool of hours or as a

separate statement of work. It will depend on how the vendor proposes to deliver service.

*36. Are potential opportunities to develop API for Talent Bound Portal considered as part of the base scope or will be considered as special projects?*

- a. We are open to both approaches at this time. We would like to see some standard hours available on a monthly basis for some development and maintenance, but we are also willing to execute on statements of work if a project is larger or needs to be done more quickly than a monthly hour allotment would allow.

*37. Can we obtain a list of the service tickets over the last 12 months to better understand what is driving this higher than average service ticket rate?*

- a. A summary list of service desk tickets will be provided and posted as an addendum to the RFP by Friday, February 28.

*38. What are the responsibilities/scope for the on-site techs?*

- a. The on-site techs are mostly acting as deskside technicians, working on laptop issues, managing on-site inventory, re-imaging laptops. For WorkOne, they also support any technical issues that arise with the computer labs and Wednesdays at WorkOne events. Staff know when the techs are on-site, and they will often hold issues until the techs are on-site.

*39. Is the on-site tech's work tied to addressing helpdesk tickets?*

- a. The on-site tech often addresses helpdesk tickets. Sometime they are finding employees to resolve an issue that couldn't be resolved remotely or providing a new laptop if the issue requires parts replacement on the employee's current laptop. They also manage the on-site inventory, patch the laptops in inventory and manage other deskside tasks they can while on-site.

*40. What is your typical service ticket aging/backlog?*

- a. EmployIndy's service ticket volume averages 188 tickets per month, with 220.75 support hours logged across all sites. While we do not have a persistent backlog, ticket aging varies by priority level. High-priority issues are typically resolved within the same business day, while lower-priority tickets may remain open longer, depending on complexity and available support resources. EmployIndy expects the selected vendor to track and report on ticket resolution times to ensure SLAs are met.

*41. Do your users submit non-critical tickets for resolution scheduling?*

- a. Yes, users submit non-critical tickets that can be scheduled for resolution based on priority and resource availability. These typically include routine requests such as software installations, access modifications, and minor troubleshooting. We expect the selected vendor to manage and prioritize these tickets appropriately while ensuring critical issues receive immediate attention.

42. *Are all hardware maintenance contracts and software support contracts active and current?*
- a. Yes, EmployIndy strives to keep all hardware maintenance and software support contracts active and current. However, as part of the transition, we expect the selected vendor to review existing contracts, identify any gaps, and provide recommendations for renewals or consolidations where appropriate.
43. *Do the hardware maintenance agreements include on-site service from the manufacturer?*
- a. Hardware maintenance agreements vary by vendor and device. Some agreements include on-site service from the manufacturer, while others require off-site repairs or third-party support. As part of the transition, we expect the selected vendor to review existing agreements and provide recommendations on optimizing service coverage.
44. *Do you maintain device spares on-site for quick service turn-around?*
- a. Yes, EmployIndy maintains a limited inventory of spare devices for quick replacements and service turnaround. However, availability depends on current stock levels and device refresh cycles. We expect the selected vendor to assist in managing spare inventory and provide recommendations for maintaining appropriate stock levels.
45. *State and Service Provider employees use laptops issued by their own employers, but use our network infrastructure and active directory... - Third party owned equipment that signs into EI's AD? It's assumed that EmployIndy-IT would then have admin privileges on non-EI equipment? Or are there layers of approval for updates/installations/modifications to these endpoints?*
- a. State and Service Provider employees use laptops issued by their respective employers but connect to EmployIndy's network infrastructure and Active Directory. EmployIndy IT does not have administrative privileges on these third-party-owned devices. Any updates, installations, or modifications to these endpoints require approval and coordination with the respective employers' IT departments. EmployIndy's role is limited to managing network access and ensuring proper authentication through Active Directory.
46. *What type of training is required as part of the Objectives? - In-person group training, 1:1 in person, self driven web-based training, live web-based group training, live web-based 1:1 training?*
- a. EmployIndy expects a mix of training formats based on staff needs and the complexity of the technology. Required training may include:
    - Live web-based group training for commonly used systems (e.g., Microsoft 365, SharePoint, Teams).
    - 1:1 training (in-person or virtual) for role-specific technical needs.

- Self-driven web-based training (knowledge base, recorded sessions, and documentation) for ongoing reference.

The selected vendor should provide a combination of these methods to ensure staff can effectively use IT systems while balancing operational efficiency. We expect the training to be very minimal.

*47. Manage and maintain the A/V equipment in our conference rooms and classrooms at the EmployIndy downtown headquarters and WorkOne Indy office. - Are these PA systems, audio conference bridges, video conferencing - what is the scope of hardware and software utilized for this?*

a. EmployIndy's A/V equipment primarily includes video conferencing systems, displays, and audio solutions for meetings and presentations. The scope of hardware and software includes:

- Video conferencing solutions (used in Microsoft Teams)
- Conference room displays and projectors
- Speakerphones and microphones for hybrid meetings
- Basic audio setups for presentations (not full PA systems)

The selected vendor will be responsible for maintaining, troubleshooting, and ensuring proper functionality of this equipment across EmployIndy's downtown headquarters and WorkOne Indy office.

*48. Judge Advocate General's Corps - "JAG" sites are mentioned in the scope for Help Desk, but JAG sites are not identified in the RFP. How many sites and staff does this include?*

a. *JAG, or Jobs for America's Graduates, is a program managed by EmployIndy's Career Connected Learning Department within schools across Marion County. The current scope of support includes troubleshooting the use of EmployIndy's existing tools and ensuring data accuracy for reporting purposes. There are approximately 25 program sites with around 30 staff.*

*49. How do you envision the optimization of the Microsoft Dynamics CRM environment? Are there specific areas you want to enhance (e.g., user interface, functionality)?*

a. EmployIndy envisions optimizing Microsoft Dynamics CRM by reducing complexity, improving data integrity, and enhancing the overall user experience. Key priorities include:

- Streamlining workflows and navigation to improve ease of use.
- Enhancing data governance to ensure consistency and reduce duplication.
- Assessing security roles and permissions to align with best practices.
- Improving integrations with Microsoft Power Platform and other systems to enhance automation and reporting.

We expect the selected vendor to conduct a full assessment of the CRM environment and provide actionable recommendations for enhancements that align with our operational needs.

50. *How frequently do you anticipate needing new applications or features developed on Microsoft PowerPlatform?*
- a. We have roughly 65 Airtable bases with only about 15 that are being used daily. We would work with the selected vendor to work with our team to prioritize which Airtable bases would best fit in Power Platform or other Microsoft solutions and work through costs associated with developing each. We expect a consistent number of projects like this for the next couple of years.
51. *What integrations or customizations are needed for SharePoint?*
- a. We believe some of the integrations and customizations will be identified during review of the Airtable bases and current application portfolio. But nothing specific has been identified at this time.
52. *What tools or platforms are currently in place for managing data in Azure, Fabric, and PowerBI? Are there any known gaps or inefficiencies in the current setup?*
- a. *EmployIndy utilizes Microsoft Fabric as a necessary component for managing Power BI and enabling effective data visualization and reporting. Fabric is used to manage semantic models, integrating data from both internal sources (such as program data and CRM inputs) and external sources (such as labor market data and partner-provided information). Given EmployIndy's role as an intermediary, bringing these data sources together is critical for high-level reporting and strategic decision-making. Currently, Fabric tools in use include:*
    - i. *Semantic Models for structured data representation*
    - ii. *Data Lakehouses and Warehouses for storage and management*
    - iii. *Dataflows (Gen2) for data processing and transformation*
    - iv. *Spark Notebook Scripts for advanced data manipulation*
    - v. *Power BI Reports and Dashboards for visualization*

*However, some aspects of Fabric's implementation have been over-engineered, leading to unnecessary gaps and inefficiencies that impact long-term sustainability. Optimizing these processes will be key to ensuring streamlined data management and reporting.*
53. *Can you clarify what types of APIs are required, and do you have any specific preferences for integration?*
- a. Data Ingestion, ETL and Transformations, Synchronization as projects. We prefer integrations that utilize Microsoft tools because of the low cost to non-profits in utilizing Microsoft tools.

54. *How do you envision the maintenance of PowerBI visualizations? Are there specific metrics or reports you want to focus on?*
- a. EmployIndy expects the selected vendor to maintain and optimize existing PowerBI visualizations as part of the monthly managed services. Maintenance includes ensuring data refreshes function properly, troubleshooting issues, and making minor adjustments as needed. If new PowerBI visualizations are required, those will be scoped separately and funded as additional projects. Key reporting areas of focus include:
    - Workforce program performance metrics (e.g., enrollments, placements, completions)
    - Grant and contract performance tracking
    - Operational dashboards for leadership and board reportingThe vendor will work with EmployIndy's internal stakeholders to ensure reports align with strategic goals and data governance requirements.
55. *Of the tools provided in the RFP, which ones do you have a desire to replace?*
- a. EmployIndy does not have a strict preference on which tools are used to service our environment. Our primary focus is ensuring the selected service provider prioritizes cybersecurity, operational efficiency, and cost-effectiveness. However, as part of our application rationalization efforts, we are looking to transition from Airtable to Microsoft Power Apps or other Microsoft solutions where feasible. Any proposed tool replacements should align with these priorities while maintaining or improving functionality.
56. *Are the contract end dates of the current toolsets aligned with the timing of the RFP and potential go-live date?*
- a. No, the contract end dates of current toolsets are not fully aligned with the RFP timeline and potential go-live date. However, EmployIndy has already paid for these tools and will either assign existing agreements to the selected vendor or explore early termination if certain tools are deemed unnecessary. The transition plan will be developed in collaboration with the selected vendor to ensure continuity and cost-effectiveness.
57. *Is there a specific budget for new / replacement of toolsets?*
- a. No, there is not a specific budget for this, but it would be considered as a part of transition expenses.
58. *Are all of the SLAs provided in the RFP being met today?*
- a. SLAs are consistently met under our current contracts. But all of the SLAs listed are not necessarily in our current contracts today.
59. *Is service provider permitted to use offshore resources to provide remote based services?*
- a. EmployIndy does not have a strict prohibition on offshore resources; however, all services must meet our security, compliance, and data

protection requirements, including those related to FERPA and WIOA. The selected vendor must ensure that any offshore resources used for remote services comply with applicable regulations and maintain high service quality, security, and data confidentiality standards. EmployIndy reserves the right to review and approve the use of offshore resources on a case-by-case basis.

60. *How many resources are providing the in-scope Infrastructure, Help Desk and Deskside services today?*
- a. Currently, our Managed Services Provider staffs approximately 2-3 resources across Infrastructure, Help Desk, and Deskside Support. Staffing levels vary based on demand, with remote support handling most issues and on-site support scheduled as needed. EmployIndy expects the selected vendor to propose an appropriate staffing model to meet the outlined service levels and business needs.
61. *How many resources are providing the in-scope application services today?*
- a. EmployIndy currently has a dedicated resource through our application services provider who exclusively supports Microsoft Dynamics CRM and related applications. This resource provides 16 hours per month for maintenance, troubleshooting, and development. Other application support is provided on an as-needed basis. The selected vendor will need to propose an appropriate staffing model to ensure continued support for Microsoft Dynamics CRM, Power BI, SharePoint, and other business-critical applications based on EmployIndy's evolving needs.
62. *How firm is the \$125K to \$250K budget?*
- a. The \$150K-\$250K budget for ongoing managed services is firm based on EmployIndy's current financial constraints. However, major projects, migrations, and upgrades are funded separately and scoped as needed. Additionally, EmployIndy pays separately for tools needed to service the account. While we are open to vendor recommendations for cost-effective solutions, any proposals exceeding the stated budget for core managed services would require strong justification and may not be feasible within our financial parameters.
63. *Please confirm the date EmployIndy would like the provider to start services?*
- a. We would like to start services in April.
64. *Is there a required threshold for XBE spend?*
- a. EmployIndy does not have a required XBE spend threshold. However, we prioritize the use of minority-, women-, veteran-, and disability-owned businesses (XBE) when awarding contracts. Vendors certified as XBE by the State of Indiana or the City of Indianapolis Office of Minority and Women Business Development receive additional points in the evaluation process, as outlined in the RFP.



65. *Of the list of tools provided in the RFP, which tools are integrated with your current ITSM tool?*
- a. EmployIndy's current ITSM tool is ConnectWise PSA. ConnectWise is provided to EmployIndy within its contract with the incumbent provider. Current integrations into the ITSM tool are as follows: RMM, Network Monitoring, Configuration Management, Lifecycle Management, Risk Management, and Backup Management.
66. *Is the Service Provider expected to lead and own the change management process or will this be owned by EmployIndy?*
- a. EmployIndy expects the selected Service Provider to lead and manage the change management process, including documentation, risk assessment, approvals, and implementation planning. However, major changes that impact business operations, security, or compliance will require EmployIndy's review and approval before execution. The vendor must work closely with EmployIndy's leadership to ensure alignment with organizational goals and minimal disruption to operations.
67. *How many system Windows Images for end user devices exist today?*
- a. EmployIndy currently maintains one standard Windows image for end-user devices, ensuring consistency across deployments. However, there may be variations based on user roles and specific software requirements. The selected vendor will be expected to review and maintain these images, ensuring they remain up to date and aligned with security best practices.
68. *What are you using for patching endpoints today?*
- a. EmployIndy's current Managed Services Provider handles endpoint patching using third-party tools, as listed in the RFP. Currently, patching is managed through ESET Management Agent for endpoint security and ConnectWise for remote management. The selected vendor will be expected to review, maintain, or recommend alternative solutions to ensure all endpoints remain secure and up to date.
69. *What M365 License level are you using today?*
- a. EmployIndy currently utilizes Microsoft 365 Business Standard licenses for most users with about 10 more on Office 365 E3 and another 10 on Microsoft 365 Business Premium. Additionally, some staff may have Power Apps Premium or Power Apps per App licenses for specific business applications. The selected vendor will be expected to manage and optimize M365 licensing to ensure cost-effectiveness and proper allocation based on user needs.
70. *How are the public facing terminals at the WorkOne facility managed and secured today?*
- a. Public facing terminals (Raspberry PI's) are physically attached to their stations. Supplementally they boot directly into a Terminal Server and the

Terminal Server sessions are cleared upon logout or timeout. The Terminal Server is running MDR, EDR, and RMM agents.

Additional public facing terminals are running Windows 10 as a guest user. These computers are utilized by the State of Indiana through a Bomgar connection to assist public users with claims. The public facing terminals are equipped with MDR, EDR and RMM agents.

Guest labs that are public facing systems are full sized desktop in specified rooms. Security cameras are monitoring the rooms. Labs have an EDR, MDR, and RMM agents installed on lab hardware.

71. *What tools are being used for alert monitoring and management of the infrastructure devices today? (and is the tool provided by EmployIndy or the current provider?)*
- a. EmployIndy's current Managed Services Provider is responsible for alert monitoring and infrastructure management using third-party tools, which they provide and manage. The key tools in use include:
- ArmorPoint – Security monitoring and alerting
  - Fortinet – Network security and firewall management
  - ConnectWise – IT service management and monitoring
  - Veeam – Backup and disaster recovery monitoring
- The selected vendor will be expected to either continue using these tools, propose alternatives, or migrate to a new monitoring solution that meets EmployIndy's security and performance requirements.
72. *How many infrastructure tickets occur per month?*
- a. Infrastructure tickets are currently categorized as: Alerts (e.g. generated by network monitoring), Backup integrity checks, Backup Remediation, infrastructure change requests, infrastructure related incidents, Patching (Server, Firewalls, Switches, etc.), and security vulnerability remediation. In 2024 EmployIndy averaged 266 infrastructure tickets per month.
73. *How many P1 Tickets occur per month?*
- a. Roughly 57 Priority 1 tickets per month but this is heavily dependent on the definition of P1 tickets, which can be negotiated during the contracting process.
74. *On a scale of 1 – 10 how would you rate the accuracy of your asset database?*
- a. 7
75. *Is there any integration between an endpoint management tool and the asset database?*
- a. No
76. *Do you have an existing CMDB with logical mappings of infrastructure and applications in-place today, or will the service provider be required to build it?*
- a. A CMDB exists today for infrastructure assets. Outside of Microsoft (i.e. Azure and 365), there is not a CMDB for SaaS applications.

77. *How many software contracts do you have today?*

a. EmployIndy primarily licenses software through subscriptions, with almost all tools being cloud-based and billed annually or monthly. However, the licensing model varies by application:

- Microsoft 365 & Power Platform – Nonprofit subscription pricing
- Adobe Creative Cloud – Subscription-based licensing
- Netsuite (Finance & Accounting) – Enterprise agreement
- Paylocity (HR)
- Airtable & Smartsheet – Subscription-based licensing
- Security & Infrastructure Tools (e.g., Fortinet, ArmorPoint, Mimecast) – Subscription or vendor-managed contracts
- About 20 additional software subscription services we utilize that are very small and niche in nature

As part of our IT service transition, we expect the selected vendor to help audit, consolidate, and optimize software contracts where possible.