



## **REQUEST FOR PROPOSAL**

### **Information Technology Managed Services**

**July 24, 2025**

#### **Purpose**

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The purpose of this Request for Proposal (RFP) is to select a new information technology (IT) managed service provider for a service contract to support the Community Development Finance Authority (CDFA), a Concord-based nonprofit with 17 full-time staff, plus interns and consultants. The successful firm will be a qualified IT managed service provider supporting our technology infrastructure, maintaining and enhancing IT security, and ensuring smooth day-to-day operations.

#### **About CDFA**

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Created in 1983, the NH Community Development Finance Authority (CDFA) supports community development, economic development, affordable housing, and energy efficiency activities throughout New Hampshire. We accomplish these goals through the provision of grants and loans to Granite State small businesses, municipalities, and nonprofits.

CDFA supports the development of vibrant and resilient communities by providing financial resources to nonprofits, community development organizations, counties, municipalities, and for-profit businesses. These organizations, in partnership with CDFA, see our work in revitalized downtowns, the building of high-quality childcare facilities, supporting the expansion of business to provide job opportunities, the creation of new housing units, investments in clean energy projects and the support and development of a healthy nonprofit sector.

CDFA operates in a hybrid environment, with staff time evenly split between office workstations and home/remote offices. CDFA retired its servers in late 2022 and operates in a completely cloud-based, Microsoft 365 environment. As a state authority and recipient of federal funds, CDFA is subject to NH's RSA 91:A (Right to Know Law) and the FOIA (Freedom of Information Act). Further, CDFA carries cybersecurity insurance and places a high priority on the protection and safety of its data.

#### **Scope of Services**

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The selected vendor will provide comprehensive IT services, including but not limited to:

##### **1 Microsoft Cloud Service Support**

- 1.1 Management and support of Microsoft 365 (Exchange, SharePoint, OneDrive, Teams, Teams Phone)
- 1.2 User account provisioning and deprovisioning
- 1.3 License management and optimization
- 1.4 Backup and recovery solutions

##### **2 End-user Support**

- 2.1 24/7 technical support available by phone and email
- 2.2 Support for commonly used software (e.g., Microsoft Office, SharePoint, OneDrive, Adobe)
- 2.3 Organizing support through a helpdesk/ticketing system
- 2.4 SLA-based response and resolution times
- 2.5 Full remote support capabilities
- 2.6 In-person support at CDFA's office when remote support will not suffice

### 3 Security Protection, Monitoring, and Training

- 3.1 24-hour endpoint protection and monitoring
- 3.2 Firewall and network security management
- 3.3 Regular vulnerability assessments
- 3.4 Annual cybersecurity training for staff
- 3.5 Phishing simulations and reporting
- 3.6 Disaster recovery support and development a disaster recovery plan

### 4 Software and Technical Support

- 4.1 Troubleshooting and resolving hardware/software issues
- 4.2 Laptop configuration
- 4.3 Printer and peripheral support
- 4.4 Consulting with the Chief Financial Officer and other Systems & Technology Team Members on general IT planning, challenge resolution, troubleshooting, and technology upgrades

### Points of Contact

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CDFA's Chief Financial Officer will be the main point of contact, with CDFA's Systems & Technology team members available to serve as backup contacts and/or support.

### Submission Timeline and Implementation Schedule (Subject to Change)

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<b>On or before July 24, 2025</b>	RFP distributed
<b>July 30, 2025, 11 a.m.</b>	Optional Q&A, Wednesday, July 30 at 11 a.m. - <a href="http://bit.ly/3IHMXCp">http://bit.ly/3IHMXCp</a> Feel free to submit advance questions to <a href="mailto:ihart@nhcdfa.org">ihart@nhcdfa.org</a>
<b>August 8, 2025, 4 p.m.</b>	Proposals due
<b>Week of August 18, 2025</b>	Interviews of select candidates
<b>August 23, 2025</b>	Provider selected
<b>August 25-September 5, 2025</b>	Negotiate and execute contract
<b>October 17, 2025</b>	Complete migration of services
<b>October 31, 2025</b>	Complete resolution of any outstanding matters

### Vendor Qualifications

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Applicants must demonstrate:

- Expertise in Microsoft 365 administration
- Proven track record in cybersecurity and user training
- Ability to provide responsive, reliable support
- Strong customer service working with end-users of varying experience and technical fluency
- Experience working with state, municipal and/or nonprofit organizations a plus

### CDFA's Responsibilities

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- Time for vendor to interview and work with staff
- System, user, and environment information (provided by Thrive, formerly Secured Network Services, Inc.)
- Third-party and other stakeholder contact information

### Requirements for Submittal

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Please include the following in your proposal:

- Company overview and relevant experience, including principals and years in service
- Description of services offered

- Proposed service levels and response times
- Pricing structure (monthly retainer, hourly rates, etc.)
- Names, phone numbers, and email addresses of contacts for client references
- Any additional value-added services

In addition, each response to the RFP must include and address the items below.

- Bidder must provide evidence of certification that the Bidder is qualified to do business in the State of New Hampshire.
- A description of the proposed approach and schedule to complete the migration of services. .
- Include the name, telephone number, and email address of the individual who will be the principal contact for CDFA.

### **Submission and Deadline**

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Proposals should be submitted in Word or PDF format via email to: Ian Hart, CFO, [ihart@nhcdfa.org](mailto:ihart@nhcdfa.org). Please put “**CDFA IT RFP – (Firm Name)**” in the subject line. Alternatively, firms can securely upload their RFP to [https://nhcdfa.sharepoint.com/:f:/s/TechnologyUpgrade/ErtFWnF\\_3qIAkQ-RBkqDSDMBA75m87fdNb\\_SWyRKCXlyNA](https://nhcdfa.sharepoint.com/:f:/s/TechnologyUpgrade/ErtFWnF_3qIAkQ-RBkqDSDMBA75m87fdNb_SWyRKCXlyNA)

Process questions may be addressed via email or to 603-717-9125

**The deadline for proposal submissions is August 8, 2025 at 4 p.m.**

Proposals received after the deadline will be accepted at the sole discretion of management, and only after consideration of extenuating circumstances.

### **Evaluation Criteria and Selection Process**

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Proposals will be evaluated based on:

- Experience and qualifications
- Quality and comprehensiveness of services
- Cost-effectiveness
- References and client feedback

A staff review committee will review and evaluate proposal submissions. Follow-up reviews may be scheduled. The award of contract will be made by written notice to the Responsible and Responsive Bidder whose proposal offers the Best Value to CDFA. The Best Value is based on objective and quantifiable criteria of the review completed. CDFA has no liability under such award until CDFA executes a written agreement to memorialize the terms, and CDFA may elect not to enter a contract at any point, in its sole discretion.

### **Reservation of Rights**

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CDFA reserves the right to:

- Amend this RFP if necessary
- Reject any proposal not meeting mandatory requirements
- Reject all proposals, seek new proposals, and cancel the RFP according to the best interests of CDFA