

Executive Summary

Pursuant to the Green Finance Authority Establishment Act of 2018 (D.C. Law 22-155; D.C. Official Code § 8-173.01 et seq.; as amended from time, DC Green Bank is an independent instrumentality of the District of Columbia created to increase the use of private funds for sustainable projects and programs by offering and promoting the use of loans, loan guarantees, credit enhancements, bonds, or other financing mechanisms for sustainable projects and programs. DC Green Bank's mission is to provide access to capital, growing the clean economy to develop a more equitable, resilient, and sustainable DC.

For more information about DC Green Bank, please see: <https://dcbank.com>

1. Purpose

Green Finance Authority more commonly referred to as "DC Green Bank" or "DCGB" seeks proposals from private-sector information technology (IT) vendors to advise and consult on hardware, software, security, and development support services. This Request for Proposal (RFP) solicits a resource to serve as the Bank's primary outsourced IT solution.

2. Scope of Services

- Propose hardware, software, security, and development support services.
- Serve as the primary outsourced IT solution to support the developed infrastructure and continue to enhance the Bank's innovative IT solutions.
- Utilize a managed service provider approach to enable DC Green Bank to enhance IT effectiveness and quality of services, minimize its support cost, and maximize IT investment return.
- Responsible for the continued building, management, reliability, and integration of DC Green Bank's information systems.
- Manage a cloud service provider as all employees are currently working in an in-office hybrid approach.
- Enhance our current systems and identify opportunities to solidify Bank's IT needs.
- Create employee, intern, and guest user Microsoft accounts.
- Configure computers for new employees or interns.
- Maintain an up-to-date access roster that reflects the various distribution lists and access levels in SharePoint.
- Manage Software as a Service (SaaS) incident response plan and serve as a liaison to the Director of Technology in the event of an incident.

- Work with the cyber security team, using Microsoft Defender, Purview, and Azure to manage actions and reactions if DC Green Bank is involved in a cyber security attack.
- Manage and provide infrastructure support to include Microsoft Office suite (i.e., Outlook, Teams, SharePoint, and Azure), website (currently hosted by WP Engine and provided by GoDaddy), and phone service (currently through Microsoft Teams and numbers purchased through NumberBarn).
- Maintain the functionality of DC Green Banks Microsoft Suite, website, and phone services.
- Manage the business continuity and disaster recovery procedures and collaborate with the Director of Technology on disaster recovery planning.
- Support the business continuity and disaster recovery planning efforts and direct response support.
- Provide remote support services by using Microsoft or Windows applications. Depending on the situation, the vendor must be able to physically take possession of an employee's computer to perform necessary services.
- Establish or use a SaaS that provides 24/7 system virtual monitoring and response.
- Provide access to help-desk support during business hours, 8:00 am – 6:00 pm, M-F.
- Occasional emergency access to 24-hour support.
- Provide the Director of Technology with laptop and mobile device support recommendations.
- Repair any computer.
- Make recommendations for computer and mobile device upgrades as replacements and/or to support evolving technology.
- Refurbish and reconfigure previous computer models to recirculate into DCGB inventory.
- Lead server management and support, including VMware infrastructure, and provide any recommendations for improvements to the Director of Technology.
- Maintain the serviceability, functionality, and security protocols for the Azure Cloud. VMware is a software program that connects devices to the DC Green Bank cloud; Recommend alternative and upgraded services as needed.
- Provide recommendations and manage SAN – storage management and optimization for DC Green Bank data.
- Provide recommendations and solutions on how to store DC Green Bank static data best.
- Work plan reporting – provide monthly status reporting with annual accomplishment reports.

- Report on a monthly basis the number and status of help desk tickets, any prevented compromises, an annual period of performance report, and any other reports that are deemed relevant to the scope of the contract.
- Provide IT and technology, development, and support for building programs to support ongoing needs.
- Provide management support for technology programs; by providing industry insights, planning considerations, technology integration between stakeholders, buy-build insights, and limited support with third-party technology vendors.
- Provide short and long-term infrastructure planning and recommendations.
- Provide consultant services regarding short and long-term infrastructure planning. Recommendations will include buy-build analysis, requirement analysis, stakeholder engagement, cost, integration, associated risks, and schedules. The level of detail or specificity required for consulting services will be determined and agreed upon during required formal and informal planning sessions.
- Provide and manage infrastructure support to include website, domains, and internal accounts.
- Manage the integration of the DC Green Bank domain and the website, additional owned domains, and internal accounts.

3. Proposal Format

The following information must be included in the vendor's proposal.

- Letter of Transmittal. This letter should **not** summarize the proposal. This letter should include the following:
 - Company name, address, and telephone number.
 - Name, title, physical address, email address, and telephone number. (Note: contacts should be authorized to represent their company in business transactions and specify where correspondence should be directed).
 - Outline your company's understanding of the proposed services and positive commitment to provide the services outlined.
 - A signed certificate of authority that the individual signing and the proposal on behalf of the vendor are legally authorized to bind the firm to the proposal and cost schedule.
 - A statement that indicated the proposal and cost schedule is valid and binding on the vendor for ninety (90) days following the proposal submission date and will become part of the negotiated contract except as mutually modified by the parties.
- General vendor information. This section should include the following:
 - Length of time in business providing proposed services
 - Total number of clients

- Number of full-time personnel, specifying job duties
- Number of part-time personnel, specifying job duties
- Office location serving DC Green Bank
- Mission Alignment on sustainability, clean economy (job creation), and inclusive prosperity.
 - Responsible sourcing methodology
 - Describe your company's approach and methodology, including benchmarking and progress goals, relating to sustainability, equity, and diversity. Describe the supplier diversity and responsible sourcing program for your company's vendors, suppliers, and subcontractors.
 - Positioning to complete services
 - Provide a history of experience providing similar services, as well as a description on how your firm is positioned to provide required services. Please include information about your resources and financial health for the past three (3) years.
 - Service Approach and Methodology
 - Please describe, in detail, your approach and methodology to provide the services required and ongoing support. In addition to describing your services, include a description of your internal security, privacy, and anti-corruption practices and/or codes of conduct.
 - References
 - Please provide three (3) references for clients with whom you have delivered similar services. Reference the actual services provided, client size, and length of services.
 - Staff Resources
 - Please provide names, titles, and job summaries of key personnel who will provide IT services to DC Green Bank. Describe the roles and responsibilities that each team member will provide to this project.
 - Terminated Contracts
 - Please provide any information where your company voluntarily terminated a contract, or your contract counterparty terminated your company's contract, during the past five (5) years. Termination for default is defined as notice to stop performance due to the vendor's nonperformance or poor performance, and the issue was either (a) not litigated, or (b) litigated, and such litigation determined the vendor to be in default if a default occurred, list complete name, address, and telephone number of the party.
 - Other Services Provide
 - Please provide a brief description of your company's other services, beyond this RFP scope, that DC Green Bank may pursue.
 - Executive Summary
 - Please summarize your proposal and your company's qualifications to complete the required services. Additionally, you may include why your firm is pursuing this work

and how it is uniquely qualified to perform it, and other information that may assist DC Green Bank in determining your qualifications. The executive summary should **not** exceed two (2) pages.

- Cost of Services

- Your proposals must contain a fee schedule that includes fixed-rate business hours support and hourly rates for additional services. Describe the rationale for pricing, specific pricing that you can provide, and potential additional charges.

- Set forth areas of expertise and provide the names of the employees in your company would be assigned to this contract/project, give a description of each person's experience and qualifications, indicate probably areas of responsibility.

4. Other Company Considerations

Proprietary information: Information submitted to DC Green Bank that the company wishes to have treated as proprietary and confidential trade secret information should be identified and labeled as "Confidential" or "Proprietary" on each page at the time of disclosure.

5. Proposal Process

Electronic submission of responses (a "Proposal") to this RFP is required. Submit proposals via email to the following email address: info@dcgreenbank.com. The subject line should be: "Proposal for IT Managed Services RFP". Proposals are due by **5:00 pm on April 7, 2023**. Company may resubmit a Proposal if circumstances change, or if the initial Proposal does not comprehensively address this RFP. Any commonly used formats (e.g., Microsoft Word, PowerPoint, Excel, and Adobe PDF) in commercial submissions are welcome.

6. Timing of Evaluation

The RFP will close at **5:00 pm on April 7, 2023**. All proposals will be evaluated, and finalists will be notified of the next steps by **April 11, 2023**, via email. Finalists will be invited to a presentation and discussion of essential details for the Proposal during the week of **April 17 - 21, 2023**, with final notification expected by **April 26, 2023**. We expected the selected firm to commence managed services by **June 1, 2023**. The terms of the contract are determined at the selection.

7. Negotiation

DC Green Bank may enter good faith negotiations with one or more of the selected Vendors at such time and in such order as the DC Green Bank may determine in its discretion. Such

negotiations' commencement does not signify a commitment to provide financial assistance or enter into a contract with a Vendor. Either the Vendor or DC Green Bank may terminate such negotiations at any time for any reason. Such negotiations shall not be limited to the scope or terms of the proposal but may include other matters or different terms as DC Green Bank may determine to be in the best interests of DC Green Bank. DC Green Bank shall have no liability or obligation of any sort hereunder, including, without limitation, if for any reason or no reason a binding agreement is not entered into with any Vendor. In making its selection of successful applicants, DC Green Bank may consider any and all factors and considerations which Dc Green Bank, in its sole discretion, deems relevant, the relative importance of which shall be in the sole discretion of DC Green Bank.

8. Award

Upon mutual agreement regarding the terms and conditions of the financial assistance, DC Green Bank and the selected Vendor may enter into a contract that memorializes the agreed-upon terms and conditions subject to all necessary DC Green Bank approvals the Board or a duly authorized committee of the Board.

9. Anti-Deficiency

Notwithstanding anything contained herein, any award pursuant to this RFP shall be subject to the provisions of (a) the federal Anti-Deficiency Act, 31 U.S.C. §§ 1341-1351 and 1511-1519(2004), and D.C. Official Code §§ 1-206.03(e) and 47-105 (2012 Repl.); (b) the District of Columbia Anti-Deficiency Act, D.C. Official Code §§ 47-355.01 et seq. (2012 Repl. and 2014 Supp.) ((a) and (b) collectively, the "Anti-Deficiency Acts"); and (c) § 446 of the District of Columbia Home Rule Act, D.C. Official Code § 1-204.46 (2012 Repl.), as each may be amended from time to time and each to the extent applicable to this RFP.