

## Request for Proposals (RFP): Managed IT and Cybersecurity Services

### 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://dcgreenbank.com>.

### 1. Purpose

Green Finance Authority, more commonly referred to as “DC Green Bank” or “DCGB,” invites information technology (IT) vendors to propose hardware, software, cybersecurity, help desk, and related policy and program development services to support DCGB’s mission and team. This Request for Proposals (RFP) solicits a resource to serve as the Bank’s primary outsourced IT and cybersecurity solution.

### 2. DC Green Bank Background

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.

### 3. Scope

DC Green Bank invites IT vendors to propose hardware, software, security, help desk, and related policy and program development support services as the organization continues to pursue its mission. DC Green Bank solicits a resource to serve as the primary outsourced IT and cybersecurity solution to support the infrastructure that has already been developed but continues to enhance DCGB’s innovative IT solutions.

The qualified vendor will utilize a managed service provider approach to enable DC Green Bank to enhance IT effectiveness and quality of services, minimize its support costs, and maximize IT investment return. The outsourcing strategy secures a single vendor prepared to take the defined responsibilities for the continued building, management, reliability, security, and integration of DC Green Bank's information systems. The prospective vendor must manage a cloud service supported organization as all employees are working in an in-office/work-from-home hybrid approach. The following systems are currently in place:

- Microsoft Office 365
- Windows laptop computers and other PC hardware (monitors, docking stations, and keyboard set)
- Integration with external applications and web service providers
- Additional details will be shared upon signing a non-disclosure agreement (NDA)

As DC Green Bank pursues its mission, enhancing current systems and identifying opportunities to solidify IT and cybersecurity needs while optimizing costs is critical.

#### **4. Scope of Services and Qualifications**

The comprehensive outsourced IT and cybersecurity solutions required include:

##### **1. Managed IT Services**

- Microsoft Office 365 licensing, including Azure and phone systems via Teams
- Advanced threat protection for email attachments and links
- Hosted back-up and support for Office 365 Exchange, SharePoint, and OneDrive
- Support multi-factor authentication where practicable and advisable
- Support and maintenance of email and file archives
- All troubleshooting support needs via 24/7/365 systems monitoring and help desk services
- Advice and procurement support for all hardware, software, PaaS, and SaaS solutions, including ensuring costs to meet DCGB objectives are minimized
- Manage software licensing and customer support
- Windows updates and security patches for all devices
- Antivirus and VPN management

##### **2. Managed Cybersecurity Services**

- Security monitoring and alerts
- Reporting
- Log files

- Remote security alert remediation
- DNS protection on all endpoints
- Security awareness training for Green Bank staff
- Quarterly phishing campaigns
- Advanced endpoint threat management
- 24/7/365 security operations monitoring on all endpoints, including emergency response
- Remediation services to prevent malicious threats
- Monthly review of security issues
- Regular testing of security controls
- Internal and external penetration testing
- Firewall management, including monitoring, remediation, reporting, and updating
- Ongoing hardware and software maintenance, including onsite and remote monitoring as needed
- Maintain the functionality of DC Green Bank's Microsoft Suite, website, internet service provider infrastructure, and phone services through Microsoft Teams. The serviceability and operability of the website is in consideration when referring to maintaining the functionality of the website. Content creation, site development, or uploading material to the website is not considered maintenance
- Cloud storage back-up to mitigate ransomware and other threats and ensure continued operations

### 3. Training, Strategy, and Policy

- Support the development of IT strategies and policies
- Manage IT programs in collaboration with Chief Operating Officer
- At least monthly meetings with key DC Green Bank staff on IT and cybersecurity developments
- IT vendor coordination
- Support for IT governance and policies
- IT risk management audits and best practice guidance and recommendations
- Regular trainings for staff on key programs and cybersecurity initiatives

## 5. Proposal Contents

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 provided similar services. Reference the actual services provided, client size, and length of services.
- Staff Resources
  - Please provide names, titles, completed certifications, 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 Provided
  - Please provide a brief description of your company's other services, beyond the scope of this RFP, 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 proposal must contain a fee schedule that includes fixed-rate monthly and annual costs, per user costs, as well as any hourly rates or per unit costs for additional services. Describe the rationale for pricing, specific pricing that you can provide, and potential additional charges that DC Green Bank may incur not envisioned at present in the scope of work but may be needed to ensure secure, cost-effective, and seamless operations. Details on software or other licensing costs – included or excluded from the rates or fees as specified in the proposal – must be outlined.

## 6. Proposal Evaluation

DC Green Bank will evaluate proposals that meet the minimum qualifications and include all applicable Proposal contents in Section 5 against the following criteria out of a maximum of 100 points.

- Organizational experience (10 points maximum)
- Personnel experience (10 points maximum)
- Compatibility with end-users (5 points maximum)
- Project approach (20 points maximum)
- Feasibility of work plan (15 points maximum)
- Alignment with DC Green Bank mission (5 points maximum)
- Satisfaction of existing clients and end-users (10 points maximum)
- Cost (20 points maximum)
- Other considerations (5 points maximum)

## 7. Other Company Considerations

Proprietary information: Information submitted to DC Green Bank that the company wishes to have treated as proprietary and confidential should be identified and labeled as “Confidential” or “Proprietary” on each page at the time of disclosure. DC Green Bank will follow applicable federal and District law related to proprietary and confidential information usage and storage.

## 8. Submission Timeline and Process

The submission period will be open from **May 13, 2024** until **June 3, 2024**.

- Electronic submission of responses (a “Proposal”) to this RFP is required.
- Submit proposals via email to the following email address: [info@dcgreenbank.com](mailto:info@dcgreenbank.com).
- The subject line should be: “Proposal for Managed IT Services and Cybersecurity RFP”.
- Proposals are due by **5:00 pm Eastern Time on June 3, 2024**.
- Company may resubmit a Proposal by the original deadline if information changes, 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.

## 9. Timing and Process of Evaluation

The RFP will close at **5:00 pm on June 3, 2024**. All proposals will be evaluated based on the criteria in the Proposal Evaluation section above and finalists will be notified of the next steps no later than **June 4, 2024** via email. Finalists will be invited to a presentation with DC Green Bank staff and a discussion of essential details for the Proposal during the week of **June 3 – 7, 2024**, with final notification of the selected firm expected by/on **June 7, 2024**. The selected firm will commence managed services by **July 1, 2024**. The terms of the contract are determined following the formal selection process.

## 10. Negotiation

DC Green Bank may enter good faith negotiations with the selected Vendor at such time and in such manner as DC Green Bank may determine in its discretion. The commencement of negotiations does not signify a commitment to contract with a Vendor. The Vendor or DC Green Bank may terminate such negotiations at any time. Such negotiations shall not be limited to the scope or terms of the proposal and may include other terms as DC Green Bank may determine to be in its best interests.

## 11. Award

Upon mutual agreement regarding the terms and conditions of the services to be provided, 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.

## 12. 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.