

Sourcing an IT Support Provider

‘Building Digital Capacity’ resources series

 

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|  |  |  |
| --- | --- | --- |
| **Resource type:** | **Strategic area:** | **Use it to:** |
| Guidelines + templates |  | * Learn about what IT support services include and how to source a provider.
 |

*Current as of June 2020*

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Other relevant resources in our **Building Digital Capacity resources series:**

* *Budgeting for technology spend*
* *Selecting technology vendors and solutions*

1 - OVERVIEW

**Overview of IT support**

IT support can be broadly broken down into two main categories:

* **Desktop and infrastructure support:**
	+ This category of support encompassesoperational issues or problems encountered by end-users when operating their devices or computers and core productivity suite. For example: new user set-up, user administration, new device set up, networking drive mapping, computer performance issues, internet or phone connectivity issues, printing issues, computer storage or memory usage problems, loss of files, procurement of hardware, asset management, problems with emailing, backing up a server, maintaining the infrastructure, etc.
	+ This type of support is typically provided by either an internal IT resource or team, or can be outsourced to an external provider. Other terms associated to desktop support include ‘IT Helpdesk’ and ‘Managed IT Services’ offerings.
	+ For CLCs, desktop and infrastructure support would include administration and support on MS365 or Google Suite (or any other productivity suite the CLC may be using), as this is part of the core set up for every member of staff. Potentially, support can also include the set up and support on additional productivity suite solutions (e.g. support on SharePoint for those using Microsoft 365 or Google Drive for those using Google Suite).
* **Specialist application support:**
	+ This covers issues or problems related to a specific application or system, such as the CLC’s website, email Marketing tool, CRM tool, CLASS, practice management software, accounting software, etc.
	+ Application support covers all levels from basic to advanced, and ranges from functional questions (e.g. helping a user with a ‘how to’ query) to technical maintenance (e.g. performing a software upgrade).
	+ Whilst it is good practice to have a super-user or subject matter expert in-house who has a good knowledge of the system and can perform basic system administration tasks, application support is usually provided by a specialist IT resource with expert knowledge and skills in that particular application / system. Cloud-based applications are usually hosted by the software vendor and basic support is often included in the subscription or license fee (advanced support may be charged at extra costs).
	+ Hence, when looking for an IT services support provider, support requirements would typically *exclude* specialist application support.

Note that this paper focuses on IT support services for desktop and infrastructure support.

**Outsourcing IT support**

Options for desktop and infrastructure support services are shown below with associated pros and cons.

|  | **In-house resources** | **Outsourced to external provider** |
| --- | --- | --- |
| **PROS** | * On-site, hands-on support
* Keeps knowledge in-house
* May provide a faster / immediate response time for small and easy queries, but depends on organisation and staffing availability
* Avoids effort involved in sourcing and managing an external vendor.
 | * Expected quicker delivery and response time, supported by formal Service Levels Agreements (SLAs) once contract is in place
* Expectation of best practices in IT management and security
* Allows organisation to transfer risks to external party
* Less expensive that internal resources equivalent
* Flexibility to scale services up or down
* Predictable costs.
 |
| **CONS** | * Resourcing cost (you need to have a backup for internal resources if these are not available), especially expensive for small centres that don’t have the size to justify the spend
* Need to invest in internal resources to keep up-to-date across technology issues and best practices
* Potentially longer response / delivery time due to capacity constraints
* There will still be cases where external help is required when internal resource does not have the skills or capacity.
 | * No immediate, on-site support (generally, all support is remote except emergency interventions on site)
* Initial effort involved in sourcing a partner
* Need for ongoing vendor / relationship management.
 |

**Where and what to look for in an IT support provider**

There are plenty of providers out there. To find an IT support provider:

**Do we need a local provider?**

As more and more systems move to the cloud and working practice change (e.g. working from home / anywhere, working in co-located offices), the need for a local provider is lessened. The vast majority of support requests can be resolved over the phone or via digital channels, and the need for a vendor to send a resource on-site is becoming more the exception than the rule.

When looking at vendors’ locations, consider their time zone (you want your business hours to match), when and how much you would need work to be done on site, and how the vendor can provide on-site assistance when required (e.g. do you have to pay for someone to travel, or does the vendor have a network of subcontractors?).

* Talk to other centres and other organisations with similar size and set-up
* Use your local and professional network
* Access ConnectingUp’s [suppliers directory](https://www.connectingup.org/directory/suppliers).

The table below provides a list of criteria and guiding questions to evaluate potential IT support providers. Use this to evaluate proposals (see next section for the Request For Proposal template).

| **Criteria** | **Guiding questions** |
| --- | --- |
| **1. Fit-for-purpose services** | * To what level do the proposed services fit with our CLC’s needs?
* Is the vendor able to meet all key requirements with their proposed support models?
* Do the services appear to be at the right level for our CLC? Is the service offering potentially over-complicated for what we’re looking for?
* Are there specific things that are excluded?
* Does the vendor have clear service level agreements and a user-friendly process for raising and tracking support requests?
* Are there additional value-add services the vendor could provide beyond desktop and infrastructure support (e.g. help with setting up SharePoint, hosting a website, provide training on MS365)?
 |
| **2. Appropriate pricing and conditions** | * Does the vendor's proposed pricing fit our available budget?
* Are there opportunities to negotiate a lower rate / cost? Does the supplier offer non-profit pricing or discounts?
* How much does the vendor charge for on-site support (rate and expenses)? Out-of-hours support?
* Are costs inclusions and exclusions clear?
* Does the pricing model cater for organisational size change?
* Does the pricing model offer predictable costs (e.g. unlimited support for a fixed fee vs pay-as-you-go)?
* Is there a fixed term agreement (e.g. 2 years)? What are the conditions and penalties for termination?
* If the vendor provides procurement services, can they access competitively priced hardware and licenses? Do they have a commercial agreement with specific resellers?
 |
| **3. Vendor experience and credentials** | * What level of experience does the vendor have with the CLC’s technical environment and type of organisation?
* Can the vendor provide credentials of clients with similar organisations?
* Does the vendor mostly serve organisations of our size?
* Does the vendor have partnerships and alliances with other technology providers?
* How does the vendor keep up to date with the latest technology developments?
* Can the vendor provide evidence of financial stability and appropriate insurances?
 |
| **4. Vendor approach** | * To what level does the vendor demonstrate they can implement and deliver the services to the required scope and timeframe requested?
* Is their proposed approach and timeframe adequate for the services sought?
* Do they have a good transition plan for taking over our existing IT support services?
* Do they have regular check-in points and ways of tracking and reporting on progress?
 |
| **5. Resources & skills** | * What is the level of skilled resources the vendor is able to dedicate to this project/services?
* Are resources easily accessible and is the vendor able to mitigate any resourcing risks?
* Where are resources based?
* Does the vendor outsource any of the support outside Australia?
* Does the vendor subcontract any of its services?
* Is there a single point of contact to escalate problems too? What happens when this person is not available?
 |
| **6. Proposal quality** | * To what level does the vendor's response show professionalism, responsiveness and clarity?
* Is the information provided as requested?
* Is the information clear? Does the vendor use a lot of technical jargon?
 |
| **7. Culture fit** | * To what level does the vendor exhibit a culture that fits well with our organisation?
* Can we see ourselves working well together?
 |

2 - TEMPLATES

**Request for Proposal (RFP) Template for sourcing an IT Support Provider**

* Copy pages 9 to 17 of this document and use this template to develop a request for proposal. Use the template as a starting point, and add and modify it as you see fit for your organisation, including formatting, header/footer, contents page, etc.
* All text in brackets [ ] needs to be replaced. Other text should be reviewed and amended as needed.
* All text in blue preceded by ‘⌦ text’ represents instructions to use the template and should be removed as you work through the sections.
* All documentation sent to external vendors should be issued in PDF format.
* Once you receive proposals, refer to the previous section *Where and what to look for in an IT support provider*  to help you evaluate them.

**Request for Proposal (RFP) Template**

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# Purpose

*⌦ Adjust the content of this section as needed, indicating number and nature of documents issued.*

The purpose of this document is to request vendor proposals for the provision of managed IT Support services to [CLC Name].

[CLC Name] is looking for a technology partner who can offer IT support services as described in section 3 of this document.

*⌦ Add any high level information about what has prompted the search for a provider (e.g. decision to outsource IT support, desire to move a new provider, organisational change, lack of IT support until now, etc).*

# Background information

## CLC overview

*⌦ Use this section to provide an overview of your CLC including mission / purpose and core services, and any other key information about the CLC you think may be relevant.*

## IT users and locations

*⌦ Use this section to provide details of (where relevant):*

* *Organisation size (number of staff and volunteers)*
* *Any organisation growth plans / changes*
* *Location(s) and working arrangements (e.g. if you have people working from home or in remote areas)*
* *Any planned changes to locations and working arrangements.*

# Scope of services

## Objectives

*⌦ Use this section to state the objectives of engaging an IT partner: add / modify content below as you see fit.*

The key objectives of the partnership sought are to:

* provide [CLC name] with a cost-efficient way of supporting its technology support services needs now and in the future;
* ensure new [CLC name] staff and volunteers can be quickly and efficiently set up as they come on board and are provided with the technology they need to perform their roles, including hardware, telecommunications, networking and productivity suite;
* provide [CLC name] with proactive support, including the early identification and resolution of issues;
* support business continuity, minimise the impact of any IT issues or outages, and mitigate IT operational risk including security.

## Current IT environment

*⌦ Use this section to describe your current IT environment, adding / modifying the table below as needed (you may need to add or remove rows). You can add technical diagrams if you have them.*

**Systems and applications:**

[CLC Name] current uses the following systems and applications:

| **System** | **Technology / software / platform used** | **Key notes** |
| --- | --- | --- |
| Client management system | CLASS |  |
| Practice management software |  |  |
| Website |  |  |
| CRM |  |  |
| eMail Marketing |  |  |
| Financial management / accounting system |  |  |
| Productivity suite | (e.g. Microsoft 365) |  |
| Document management |  |  |
| Other (add as required) |  |  |

**Infrastructure and networking:**

*⌦ Include information about what you currently have in place:*

* *Current infrastructure (telephony, internet, servers, networking). If you have technical documentation like infrastructure diagrams, include them*
* *Current support services (e.g. internal resource, helpdesk, external provider)*
* *If you have multiple offices, make sure to include information for each location.*

## Services sought

*⌦ Use this section as a* ***baseline*** *to state your requirements. Review the content provided and modify as needed. You may need to add or remove some of the items listed below depending on what your CLC requires.*

The requirements for support services identified for [CLC Name] include:

1. **User set up and administration:**
* Hardware procurement and setup: PC / laptops, mobile devices (tablets / smartphones), peripherals (headsets, monitors, computer accessories), connection to printers
* Productivity suite setup: user account setup, email, access to desktop and online versions of MS office, etc
* Telco setup (internet, networking, phones): this may include setup for employees working in [CLC Name]’s office(s) as well as staff working remotely (e.g. from home)
* Employee IT onboarding: basic usage of equipment and access to productivity suite and IT policies
* Ongoing user administration and exit.
1. **Ongoing support:**
* Helpdesk services for user / desktop support
* Issue resolution and troubleshooting
* Repair / replacement of faulty equipment
* Phone system administration *⌦ If your CLC has specific phone / telco features or related needs, add here (e.g. tollfree phone line)*
* Networking and internet access set-up
* Security and performance audit and monitoring, proactive monitoring of desktop health
* Maintenance and proactive implementation of updates to operating systems, virus detection programs, malware management systems and other security-related items
* Monitoring and maintenance of networking and internet connectivity
* Asset (hardware and software) management including tracking of user allocation and operating systems versions
* Regular status reporting
* Onsite support when required (emergencies only) in [CLC Name]’s locations
* Business hours support (8am – 6pm).

**Out of scope:**

* Specialist applications implementation and support services (e.g. client management system, website, CRM, accounting software).

## Timeframe

*⌦ Use this section to indicate your desired start date for engaging IT support services. Specify any upcoming event or dependencies that may drive or impact this timeframe.*

IT support services are required [insert timeframe information].

# RFP process

*⌦ Review this entire section and amend content as required.*

## Overview

[CLC Name] will operate a closed RFP process with a limited number of vendors invited to respond and present.

## Timeline

*⌦ Enter target dates as needed, adjusting steps where required.*

|  |  |
| --- | --- |
| **Key step** | **Target Date** |
| RFP Issued | [update date of issue] |
| **Proposal due date** | **[enter date proposal due: issue date + 2-3 weeks]** |
| Vendor presentations  | [enter target dates for presentations] |
| Vendor selected by | [enter date targeted for vendor selection] |
| Contract signed by | [enter date targeted for contract signature] |
| Work begins | [enter date targeted for commencing work] |

## Contact

Please send queries about this RFP as well as your proposals to:

|  |  |
| --- | --- |
| **Name** | [Name of CLC’s point of contact for this RFP] |
| **Role** | [Role of CLC’s point of contact for this RFP] |
| **email** | [email address RFP and RFP questions should be sent to] |
| **Phone**  | [contact phone number] |

## Response format

Please submit your responses in Microsoft Office document format or PDF.

## Proposal presentations

Vendors responding to the RFP will be invited to present their proposals:

* presentations will be held either on site [indicate location] or virtually via video conferences
* presentations dates and times will be communicated to vendors ahead of time.

## Response evaluation

The following elements will be used in evaluating the submitted proposals and in vendor selection:

* **Quality of response:** completion of the responses in the correct format and on time, and to the required level of information completeness (see next section ‘Vendor information requested’)
* **Services fit:** the extent to which the proposed approach and services fulfills thestated business and technical requirements
* **Proposed approach:** assessment of the vendor's ability to deliver services in accordance with specifications and timeline
* **Vendor strength:** vendor’s stability, experience and record of past performance in delivering a comprehensive solution in our sector or with similar types of organisations, and evidence of availability of sufficient high quality personnel with the required skills and experience for the proposed approach and timeline
* **Overall cost of vendors proposal.**

Note that whilst [CLC Name] has every intention of proceeding with the award of an agreement(s) for a solution and associated services, [CLC Name] may at its discretion choose to discontinue this RFP process without obligation.

# Vendor information requested

Vendors are invited to provide their responses using the structure shown in this section. Vendors are welcome to add to their response any other section/information they feel will be helpful to [CLC Name] in assessing their proposal:

**Services offering and credentials:**

* company information and overview of services and products offered
* certifications, accreditations and partnerships
* credentials with examples of similar projects delivered successfully, including at least 2 contactable references for similar organisations and projects in a comparable sector.

**Proposed solution:**

* solution fit to requirements (see scope statement), highlighting in particular where it may not be able to meet the requirements, or can only meet requirements partially, or where requirements require complex customisation/development
* overall systems architecture including integration points, infrastructure and hosting
* vendors are also invited to present functionalities that the solution / product offers beyond the stated requirements and will provide [CLC Name] with value-add capabilities
* solution sustainability and product development pipeline (future capabilities).

**Project approach:**

* timeline for solution delivery
* approach and methodology for implementation
* approach for system operationalisation (post go-live / ongoing system support, development, usage and adoption)
* project organisation and resourcing, including resources requirements on [CLC Name]’s side
* assumptions and dependencies
* scope change management approach.

**Pricing:**

Vendors are requested to provide pricing information as follows:

* implementation costs with breakdown of fees by key project phase / deliverable
* solution pricing and ongoing costs for support and maintenance: license(s) fees, license fee model, hosting, support costs, etc.
* total estimated costs over 3 years
* contract terms and rates
* pricing exclusions
* costing assumptions.

**Terms & Conditions:**

* vendor standard contract, terms and conditions
* terms and conditions pertaining to product support and warranty
* evidence of insurances and financial viability.

**Other information:**

Include any other information vendors feel relevant to the response that may assist [CLC Name] in evaluating the proposal (e.g. key personnel profiles, case studies, etc.).

# Terms, Conditions and Disclaimers

*⌦ This section is generic and may be replaced by [CLC Name] standard terms, conditions and disclaimers.*

[CLC Name] reserves the right, in its sole discretion, to terminate this RFP process prior to the execution of a written contract without any liability to [CLC Name].

Your are hereby advised that [CLC Name] is not committed to any course of action as a result of its issuance of this RFP and/or its receipt of a Proposal from you or other companies in response to it. In particular, you should note that[CLC Name] may, at its sole discretion:

* Reject any response which does not conform to instructions and specifications which are issued herein
* Not consider responses submitted after the stated submission deadline
* Not necessarily accept the lowest priced proposal
* Reject any or all proposals, if it so decides and discontinue the RFP process
* Negotiate with one or more vendors
* Award a contract in connection with the RFP at any time
* Award a contract on the basis of the initial offer, without discussion or request for a best and final offer
* Award only a portion of the contract
* Make no award of a contract
* Award more than one contract
* Depart from the procedures set forth in this RFP in any manner determined by [CLC Name] in its sole discretion without notice or explanation.

[CLC Name] shall have no liability to any party with respect to the manner in which this RFP process is conducted or the contract is awarded.

All prospective subcontractors contracted by your firm in any manner should be expressly advised in writing that no solicitation on your behalf shall be construed in any manner to be an obligation on your part to enter into a subcontract with said subcontractor, or to result in any claim whatsoever against [CLC Name] for reimbursement of costs for any effort expended by said subcontractor regardless of whether or not your firm is successful in receiving an award as a result of this RFP.

**Reliance on oral statements:**

No bidder may consider any oral representations or statement by an officer, employee, or agent of [CLC Name] to be a binding representation on its behalf. Any attempt to circumvent this process may result in immediate disqualification from the RFP process, at [CLC Name]’s sole discretion.

**Code of ethics:**

Bidders are not permitted to extend to [CLC Name] employees or volunteers and [CLC Name] employees or volunteers are not permitted to solicit or accept any commissions, payments, gifts, kickbacks, entertainment, or other things of value. The vendors acknowledge that the giving of any such payments, gifts, entertainment, or other things of value is strictly in violation of [CLC Name]’s policy on conflicts of interest and any such activity may result in the disqualification of the vendor bidder and/or in the cancellation of any contract between the parties. The vendor must notify [CLC Name]’s personnel department of any solicitation by any of [CLC Name]’s employees, volunteers or agents.

**Vendor reference check template**

When selecting an IT support services provider, it is highly recommended that you run reference checks with at least 2 to 3 of their current customers, ideally of comparable nature (similar organisation size / set up). The template provides a set of questions to guide your discussion with the referee.

|  |  |
| --- | --- |
| **IT Vendor Name:** |  |
| **Reference check done by:** |  |
| **Date:** |  |
| **Client reference name / role:** |  |
|  |
| **Overall how would you rate the vendor and their services for your organisation:** |
| 🞏 Poor | 🞏 Average | 🞏 Good | 🞏 Excellent |

|  |
| --- |
| 1. Can you provide a brief overview of the services provided delivered by the vendor (organisational context, number of users, types of services, etc.)?  |
|  |
| 2. Why did you select this vendor over others? |
|  |
| 3. Has the vendor delivered the services as per their original proposal? Are services meeting your requirements in terms of quality, speed of response and costs?  |
|  |
| 4. Do you find the vendor understands your needs well and is able to engage effectively with your teams and end-users? |
|  |
| 5. Was the implementation of services done well? How was the transition from the previous support model to the new vendor done?  |
|  |
| 6. Have you encountered any major problems or constraints with the vendor or their services? |
|  |
| 7. Do you find the vendor is able to effectively manage change, conflicts and problems? |
|  |
| 8. Are there things you wish the vendor would do differently? |
|  |