



Michigan Saves[®]

The Nation's First Nonprofit Green Bank

Request for Proposals: Managed Information Technology and Security Services

Purpose

Michigan Saves, a nonprofit green bank, is seeking proposals from qualified IT managed services providers to deliver comprehensive and proactive technology support, infrastructure management, IT security, and strategic IT guidance. Key values we desire in our partner include subject matter expertise, reliability, a customer-focused approach, and innovative solutions. The prospective vendor's initial contract period will be until December 31, 2026, with the option to extend the contract based on mutual agreement. This RFP outlines Michigan Saves' technical requirements, expectations of potential vendors, current IT infrastructure and equipment, and the selection of vendor process. Michigan Saves welcomes bids that include innovative ideas that meet today's complex and ever-changing IT environment.

RFP Contact, Submission Instructions, and Timeline

All correspondence for this RFP, including submissions, should be directed to Kelsey Smith at ksmith@michigansaves.org. Email correspondence only, no phone calls.

Please submit responses via email to Kelsey Smith at ksmith@michigansaves.org by 5:00 PM EST, **June 30, 2025**. If applicants have any questions in advance of the proposal deadline, please email Kelsey no later than 5:00 PM EST on June 13, 2025. Responses to questions will then be circulated to all interested parties in one email. If you would like to be on that distribution list, please email Kelsey.

Exhibit 1. RFP Schedule

RFP release	May 30, 2025
Deadline for submitting questions	June 13, 2025, 5:00 pm ET
Deadline for Michigan Saves response to questions	June 20, 2025 5:00 pm ET
Deadline for submitting RFP response	June 30, 2025, 5:00 pm ET
Interviews of finalists, if necessary	Week of July 14, 2025
Successful bidder is contacted	Week of July 21, 2025
Contract negotiation	July 28–August 6, 2025
Michigan Saves Board of Directors approval of contract	August 14, 2025
Anticipated start date	August 15, 2025

Overview of Michigan Saves

Michigan Saves, the nation's first nonprofit green bank, is dedicated to accessible, equitable, and just investments in energy efficiency and clean energy to support healthy and thriving communities. Michigan Saves offers the financing solutions and contractor network that make energy efficiency and renewable energy improvements easy and affordable and by advancing a more energy-conscious culture in Michigan.

Currently, Michigan Saves has a management services agreement with Public Sector Consultants (PSC), which provides comprehensive staffing, administration, and management services for the organization, including office space, IT equipment, network, and support, human resources, etc. No later than January 1, 2026, Michigan Saves will be transitioning to an insource staffing model, where all staff are employees of Michigan Saves, not Public Sector Consultants. As such, Michigan Saves will need to procure its own office space and establish its own IT environment.

Michigan Saves has a hybrid workforce of 19 staff across Michigan. The organization currently has a physical location in Lansing, but we are exploring a move to other office space in the greater Lansing area. We expect at least six staff to regularly use the Lansing office and at least three staff in a Detroit office that is yet to be established. The remaining 10 staff are fully remote in Michigan. Our desired IT infrastructure includes the following elements:

- Identify platform: Google cloud identity
- Email hosting: Google workspace
- File storage and sharing: Google drive shared drives
- Computer hardware: PCs and Macs
- VOIP: Zoom phone
- Other software and applications used by Michigan Saves: Monday.com, Cognito, DocuSign, ISpring, Scribe, Tableau, Hubspot, Canva, Smartsheet, Wordpress, Quickbooks, Amazon Web Services (AWS), Lastpass,

Michigan Saves has two propriety systems. The first is a loan origination system (LOS) from a third-party vendor. Here, Michigan Saves accepts loan applications from residential customers throughout Michigan, automatically decisions those applications against established underwriting criteria, and transmits the loan application, credit bureau, and loan decision via secure file transfer protocol to an authorized lender. Secondly, Michigan Saves owns a proprietary project management system that is maintained by a third-party vendor. This system connects to the LOS via an API and receives basic information about the loan application. This system is used by authorized lenders and contractors to track the status of the loan application and the clean energy project being financed by the customer. Our IT partner would not directly support these propriety systems. However, within these two

systems, staff has access to confidential consumer financial information, so providing strong network security is critical.

Additionally, the successful bidder will assist Michigan Saves with an IT separation from PSC, including establishment of Michigan Saves IT infrastructure, file migration, and email separation and restructuring to retain existing email addresses. Currently, all files are stored in Box and Google Drive.

Scope of Work and Service Requirements

Michigan Saves seeks an IT partner who can assist us in the areas of IT management and support, IT security, and strategic advisory services. While we have provided definitions for each of these categories below, we encourage respondents to recommend additions or amendments based on their subject matter expertise, knowledge of emerging IT issues, and understanding of Michigan Saves' needs following initial discovery. The selected vendor will be responsible for providing the following services:

1. **IT Transition Support.** As Michigan Saves separates from PSC by December 31, 2025, the IT partner will establish a new IT environment and infrastructure for Michigan Saves and will work with PSC's IT vendor to migrate Michigan Saves' files, email structure, and other IT integrations from PSC's IT environment to Michigan Saves' new IT environment.
 - **Transition Planning**
 - Prepare a transition plan with detailed tasks and timelines for creating Michigan Saves' IT environment and migrating data, files, and other information from PSC to Michigan Saves
 - **IT environment and infrastructure set-up**
 - Set-up Google cloud identity, workspace, and shared drives
 - Establish secure internal network and create internal and guest Wi-Fi
 - Assist with the purchase and configuration of new or existing laptops, monitors, and other hardware
 - **Data migration**
 - Move Michigan Saves files from Box to Google Drive environment and provide related troubleshooting
 - Ensure systems for data back-up and recovery are in place and functioning
 - **Email migration**
 - Since Michigan Saves has a management services agreement with PSC, all Michigan Saves staff are PSC employees. Therefore, an @michigansaves.org email address is an

alias for an @publicsectorconsultants.com email address. The IT partner will need to develop and implement a process for transferring the @michigansaves.org email address from PSC to Michigan Saves and ensure access to historical emails.

2. **IT Management and Support.** Michigan Saves wants an IT partner who will leverage their deep expertise and commitment to customer services to manage our daily IT needs seamlessly and reliably through:

- **Access Control and Identity Management**
 - Implementation and management of identity and access management systems, including multi-factor authentication and single sign-on to safeguard access
 - Ensuring access permissions align with job roles and responsibilities
- **Network & Infrastructure Management**
 - Proactive monitoring, patching, and maintenance of network devices
 - Real-time, 24x7 monitoring of network systems to proactively identify, communicate, and resolve issues
 - Conducting regular performance audits to maximize efficiency
 - Manage AWS accounts for the loan origination system and data warehouse
- **Help Desk and End-User Support and Training**
 - Help desk support during normal business hours from 8:00 a.m. – 5:00 p.m. ET, Monday through Friday (with 24/7 emergency support available) for on-site and remote staff. Access to help desk will be available via phone and a secure support portal.
 - Regular staff training for cybersecurity awareness and IT tools, including simulated phishing exercises
- **Cloud Services Management**
 - Support for Google Workspace, and cloud-based infrastructure for secure and efficient data storage, backups, and user access control
- **Asset & License Management**
 - Tracking and renewal management of hardware, software, and licenses
 - Delivery and on-site set-up of hardware, including PCs/Mac, printers, monitors, etc.
- **Telephony and VoIP Solutions**

- Maintaining and integrating phone systems (e.g., Voice over IP) with other IT platforms to ensure seamless communication. Michigan Saves uses Zoom phone and would expect our current system and organizational phone numbers to be migrated into the new IT environment
3. **IT Security.** Michigan Saves understands that having robust cybersecurity planning and protections are critical to protecting our IT infrastructure and the personal data of our customers. We seek an IT partner who will help us stay ahead of threats and respond quickly and effectively when intrusions are detected.
- **Cybersecurity & Compliance**
 - Threat detection, antivirus, firewall management, business continuity and disaster recovery, and compliance support
 - Cyber risk assessment and vulnerability testing (internal and external)
 - Planning for cyber threat prevention, mitigation and response
 - **Information Security and Compliance**
 - Recommendations for Michigan Saves' written information security policy
 - Understanding of financial security standards, such as SOC2 or the Gramm-Leach-Bliley Act (GLBA) (the financial equivalent of HIPAA) and how to apply these standards, when applicable, to our systems
4. **Strategic IT Planning.** As a small nonprofit organization, Michigan Saves staff does not have the time or expertise to stay updated on emerging technology issues. We desire an IT partner that can serve as an advisor on our IT strategy, enable us to optimize our existing IT solutions, and assist with decisions about investments in technology.
- **Technological Assessment**
 - Annual technology assessments, budget planning, and roadmap development
 - Planning and executing scheduled upgrades of hardware to avoid obsolescence
 - **IT Scalability and Future Planning**
 - Developing an IT roadmap to ensure scalability as Michigan Saves grows
 - Advising on new or renewal of Michigan Saves' software development and maintenance contracts with third-party IT/programming vendors to achieve security and product quality objectives in a cost-effective manner

- Recommending and implementing technology solutions that align with organizational goals, including strategic counsel on third-party supported proprietary software systems for loan origination and data collection and reporting

Submission Requirements

Interested firms and individuals are invited to submit proposals addressing the following:

1. Company Overview

- Company history
- Number of years in Industry
- Number of Full Time Employees (specify Domestic vs Overseas)
- Number of customers
- Length of time providing services proposed in response
- Headquarters location and location of key operations centers

2. Relevant Experience

- Demonstrate the company's experience by providing examples of how you successfully assisted customers of similar size and need
- Describe any products and services provided by the firm that would address Michigan Saves needs
- List any certifications or partner affiliations that your company has
- Describe any experience with financial security standards, such as SOC2 and GLBA

3. Team Experience and Qualifications

- Education, expertise, and qualifications of professionals who will be assigned to work with Michigan Saves. Bios and resumes are acceptable.

4. Project Understanding and Solution Narrative. This narrative is the respondent's opportunity to describe their understanding of our needs and their value proposition for meeting the unique requirements of Michigan Saves. The respondent should thoroughly review and acknowledge the scope of services and requirements listed above and clearly link its products and services to the scope of work and outline any Michigan Saves resources that you would need.

5. Approach and Methodology. Provide a detailed explanation of how the company will meet the four service areas identified in the Scope of Work. Please include descriptions of the unique skills, capabilities, tools, programs, and expertise that will be offered and distinguish the company from its competitors. Identify any challenges that would prohibit the company from successfully executing an IT managed services contract for Michigan Saves and how you would overcome those barriers.

Please provide details outlining your ability to provide help desk service via phone and support portal and suggest typical SLA's that you would recommend for Michigan Saves.

6. **Budget.** Michigan Saves is requesting a two-part budget, as described below.
 - **Part 1: IT transition support (work scope item 1).** Because of the unique and unknown challenges associated with separation from PSC, Michigan Saves would like a time and materials budget for one-time transition costs. Transition costs would be accrued from contract initiation through December 31, 2025 or when Michigan Saves separates from PSC, whichever comes first. Prospective bidders should provide a fee structure, billing rates, and any additional costs associated with the services to be provided.
 - **Part 2: IT management and support, security, and strategic planning (work scope items 2–4).** For ongoing and routine IT management and support, Michigan Saves welcomes either a fixed price or time and materials budget or a combination of the two. Michigan Saves is interested in pricing structures that may provide greater certainty in containing costs while recognizing technical needs and the related scope of work may evolve over time and some services may be provided on an as-requested basis based on emerging needs of Michigan Saves. All proposed fee structures, whether fixed price or time and materials, must include a cost ceiling.
7. **References.** Provide references from current or past clients who can attest to the quality of your firm's services.
8. **Disclosures.**
 - Diverse Vendor and Partner Form: Complete and return the Michigan Saves diverse vendor in Attachment A.

Respondents may include any other information that Michigan Saves should consider. All responses will be treated as confidential. Michigan Saves is not liable for any costs incurred by applicants in responding to this RFP.

Selection Criteria

Michigan Saves will evaluate proposals based on the responsiveness to the RFP requirements, the vendor's expertise and experience in the areas above, and the proposed pricing structure. Michigan Saves will select the best overall solution to fit its needs and is not obligated to select the lowest price bidder.

All responsive submissions will be evaluated and awarded based in consideration of the following criteria:

1. **Experience and Qualifications.** Experience demonstrated by the prospective vendor in servicing businesses and organizations of similar size and complexity to Michigan Saves will be highly

valued. Expertise with the specific systems used by Michigan Saves will be required. The size and sophistication of the prospective vendors business as well as whether the vendor has a dedicated group providing and supporting a managed support service will be considered.

This evaluation also considers the number and qualifications of management, supervisory and other staff proposed by the vendor to complete the contract. Resumes of everyone who would be or could potentially be assigned work under a contract award resulting from this RFP should be provided.

2. **Ability to Implement the Solution.** Michigan Saves will evaluate prospective vendors on their capability of completing RFP requirements. Within each requirement, Michigan Saves asks each vendor to outline any Michigan Saves resources needed for consideration. In addition to support and management of the existing environment, the ability to provide and complete project-based services over the life of the agreement will be considered. Michigan Saves is not looking at this effort as a support contract, but a partnership that involves advisory, implementation and migration services as technology and business requirements evolve.
3. **On-site accessibility.** While not required, Michigan Saves will prioritize prospective vendors that can provide on-site support in Lansing, either on an occasional or regular basis, or otherwise be physically accessible to troubleshoot issues as needed.
4. **Diverse vendor and partner form.** Michigan Saves is committed to partnering with small businesses and businesses owned by members of underrepresented populations to break down barriers to growth. Michigan Saves encourages the participation of businesses owned by minorities, females, and persons with disabilities in the implementation and execution of all projects, either on a direct basis or through sub-contracting efforts.
4. **Cost.** The proposed pricing structure, as noted in work scope item 6, including billable rates and any discounts to nonprofit clients.
5. **References.** The company's experience with organizations conducting activities like those of Michigan Saves (e.g., investment funds, community development financial institutions, other green banks, commercial lenders).

After reviewing the responses, Michigan Saves may interview one or more respondents and engage in negotiations regarding the scope of work and other details. Michigan Saves expects to award a contract to one vendor in August 2025.

The issuance of this RFP and/or receipt of information from you or other respondents in response to it does not commit Michigan Saves to any course of action. Furthermore, this RFP does not imply that Michigan Saves is making an offer to conduct, expand, or terminate business with any respondent. Michigan Saves reserves the right to accept a complete response, or portion thereof, to accept multiple responses, or to accept none of the responses. All costs associated with preparing

respondent's proposal in response to this RFP and for providing any additional information requested by Michigan Saves to facilitate the evaluation process, including but not limited to interviews, are the sole responsibility of respondent and will not be reimbursed by Michigan Saves.

Attachment A: Vendor and Partner Diversity Form

Michigan Saves is committed to engaging with partners and vendors that reflect the diversity of the many communities we serve. Our Diverse Partner and Vendor Program is an intentional opportunity for Michigan Saves to support our mission and break down barriers to growth that exist for minority business owners and ensure that everyone—without exception—has access to the benefits of energy efficiency.

Partner/Vendor Name: _____

Date: _____

Signature: _____

Please check all that apply to your organization:

- ☐ Disability-owned Business Enterprise
 - People with disabilities own and control at least 51 percent of the company.
- ☐ Lesbian, Gay, Bisexual, and Transgender Business Enterprise
 - LGBTQ+ individuals own and control at least 51 percent of the company.
- ☐ Minority-owned Business
 - Minority group members own and control at least 51 percent of the company.
- ☐ Service-disabled Veteran-owned Business
 - Service-disabled veterans own and control at least 51 percent of the company.
- ☐ Social Enterprise Business
 - A for-profit or nonprofit organization or venture that achieves its primary social or environmental mission using business methods.
 - Surplus is principally reinvested in social activities, not driven by need to maximize profit for shareholders and owners.
- ☐ Supported Business
 - Over 50 percent of the business's workforce are disabled individuals.
- ☐ Veteran-owned Business
 - Veterans own and control at least 51 percent of the company.
- ☐ Women's Business Enterprise
 - Women own and control at least 51 percent of the company.
- ☐ Women-owned Small Business
 - The company must be a small business.
 - Women own and control 51 percent of the company.
- ☐ None of these

Michigan Saves understands that the complex, and at times high-cost, diverse business certification process can present inequitable barriers for small businesses and thus does not require diverse

business certification from a national, state, or locally recognized third-party certification agency. Please self-certify if any of the above apply to your business.

While Michigan Saves does not guarantee business to any vendor, we are committed to providing diverse companies an opportunity to compete on a fair and equal basis for our business.

Additional Partner Questions

1. Is your organization located in or provide targeted services/programming to a specific community that could be defined as disadvantaged, such as those with a majority of low-income or minority households?¹

2. Does your organization offer programs or training to internal staff related to diversity, equity, and inclusion? If so, please describe your program.

3. Our lending partners are sometimes certified by or affiliated with groups or programs that help them establish their services in communities with the greatest need. Please check all the following designations or certifications that apply to your organization:
 - ☐ Community Development Financial Institution (CDFI) Certification
 - ☐ Minority Depository Institution (MDI) Designation
 - ☐ Low-income Designation (LID)
 - ☐ Other: _____

¹ To be considered a disadvantaged community, a community must have at least 30 percent of households classified as low income. If you would like more information on additional qualifiers, see examples at <https://www.energy.gov/diversity/justice40-initiative>