Preamble

Thank you for all the questions. A common refrain in these questions is what IT environment does Michigan Saves have now and what does Michigan Saves want in the future. The current IT environment has been developed and refined for Public Sector Consultants (PSC) over many years and has generally worked well for Michigan Saves' purposes. This set-up creates a fundamental question. Is a replication of the current system the best option for Michigan Saves? We don't know and cannot say whether a "lift and shift" approach is best for us. Respondents should not assume that the current IT system, which was not designed for us, is the best system for Michigan Saves in the future. Except for our desire to move to a Google-based IT environment (e.g., Google cloud identity, Google workspace, and Google Drive/Shared Drives) and our need to protect sensitive financial data, we have no opinions on the best IT environment for Michigan Saves. There will be a discovery process immediately after contract initiation, where the winning respondent can get all the detail about our existing IT environment.

Michigan Saves does not have an IT Director, nor IT staff to guide this process. Through this RFP, Michigan Saves seeks an IT partner who can assist and guide us with IT development, management, and support, IT security, and strategic advisory services. We are relying solely on this IT managed services provider (MSP) to understand our business and our needs and design and manage an appropriate IT environment. The winning respondent should consider this RFP as a fresh start for Michigan Saves. While there may be elements of our existing IT environment that carry-over into the new systems, respondents should approach this RFP with an eye toward building a brand-new IT system that meets our unique needs. Of course, this does not mean that we can afford all the "bells and whistles." But we need a solid foundation that is resilient and secure yet allows for future scalability and growth.

In this RFP, we are not asking for respondents to articulate all the details of a new system and provide a response with lots of IT jargon. Rather, we are looking for respondents to show an understanding of our situation and needs as a nonprofit green bank, articulate a value proposition that meets our needs and budget, and demonstrate the skills, capabilities, tools, programs, expertise, and customer service that distinguishes the respondent from other competitors. We will be leaning on the IT partner, as a strategic advisor, to guide us through the process of creating a new IT system and implementing the most appropriate solutions within our budget.

A. General Questions

1. **Incumbent Provider: Are there any incumbent vendors currently providing IT managed services? If so, what is prompting the rebid or change?**
   Michigan Saves has a managed services agreement with PSC, which provides staffing and administration, such as human resources and IT, for the organization. PSC has an IT managed service provider that maintains its network and supports all staff. Michigan Saves is separating from PSC and adopting an in-source staffing model, where the organization will hire its own employees instead of contracting with PSC to provide employees. The separation also means that Michigan Saves will need to provide for its own human resources, IT, and other management services. Michigan Saves internal policies require us to competitively procure services above a certain dollar amount, which necessitates this RFP.

2. **Incumbent Insight**: **Are you currently working with an MSP or internal IT resource? What works well and what needs improvement?**
   Michigan Saves is currently served by PSC's IT MSP. We do not have an IT director or any internal IT resources. It all works well, and we cannot think of any areas of improvement.

3. **Can you detail the anticipated project timeline, including key milestones, for the IT separation from Public Sector Consultants, and specify if a project manager has been designated for this initiative?**
   Michigan Saves must separate from PSC by December 31, 2025, at the latest. However, Michigan Saves does have the option of leaving earlier if certain circumstances occur. That said, we do not anticipate any scenarios where we would leave any earlier than November 1. The Chief Operating Officer will manage this project, with support from the Executive Administrative Manager. The winning respondent's first task upon hiring is to work with Michigan Saves to craft a comprehensive transition plan with key tasks and milestones.

4. **Budget Range: Is there a defined budget range or ceiling for this engagement? Are there preferred pricing structures (e.g., fixed fee, retainer, time & materials)? Would you prefer a tiered options-based proposal?**
   As noted in the RFP, we would like a time and materials budget for costs associated with the separation from PSC (e.g. task 1 in the RFP). For routine and ongoing support after the separation period (e.g. tasks 2 –4 in the RFP), Michigan Saves welcomes either a fixed price budget, a 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.

5. **Has a detailed IT budget been formulated for both the transitional and ongoing support phases, and could you define its scope and limitations?**

Michigan Saves budgets on a calendar year basis and the amount budgeted for IT services in 2025 is largely for the transition tasks and development of our new IT environment. We do not share our budget because we want to understand the market for these services and ensure competitive pricing. Michigan Saves will begin developing its 2026 budget after awarding this RFP and will consult with the IT MSP as it develops the 2026 IT budget.

6. **Team Structure: How many Michigan Saves team members currently require direct IT support?**
   Michigan Saves has 19 staff that require direct IT support, with 6 based in Lansing, 3 in Detroit, and the remaining 10 staff remote.

7. **Onboarding Timeline: What is your ideal timeline for onboarding the selected vendor? Are there mission-critical deadlines driving this procurement?**
   The Michigan Saves Board of Directors will approve this contact on August 14. Onboarding will begin immediately. The first task is a discovery period with the current IT MSP, followed by the development of a comprehensive transition plan with key tasks and timelines.

8. **Does your organization have a preference regarding the location of IT support services, including on-site support in Lansing or Detroit, or is remote support deemed sufficient?**
   We do not have a preference as to where the MSP is located. For most situations, remote support is sufficient. We would expect on-site support when needed or requested.

9. **Does your organization have an in-house IT leader or a technical stakeholder who will work in tandem with the IT partners during the transition phase?**
   Michigan Saves does not have an IT director or leader. During the transition phase, the MSP will be working with Michigan Saves Chief Operating Officer and the Executive Administrative Manager, PSC's Director of Administration, and PSC current IT MSP.

10. **Proposal Focus Areas: Are there particular areas (e.g., help desk responsiveness, cybersecurity posture, automation potential) you want vendors to emphasize in their proposals?**
    There are no specific areas that vendors should emphasize in their proposal.

11. **Please provide an estimation of the time required to thoroughly plan and implement the IT transition, involving collaboration between the incumbent and new IT service providers.**
    We believe that it will take 60 to 90 days to thoroughly plan and implement the IT transition from PSC. The transition, including key tasks and milestones, will be articulated in a comprehensive plan that Michigan Saves and the IT MSP jointly develop after contract execution. As noted in the RFP, our biggest concern and perhaps the most challenging transition task, is the transfer of the @michigansaves.org email from an alias of an @publicsectorconsultants.com email address to a stand-alone email address owned by Michigan Saves.

12. **Can you confirm if the existing service provider will be available during the planning and transition phase, providing critical insights into the current systems configuration and access to existing resources?**
    Yes, the current IT MSP will assist transition planning and implementation.

B. Technical + Strategic Insight Questions

13. **Current Environment: Can you describe your current IT environment (e.g., on-prem vs. cloud, core applications, network topology)?**
Michigan Saves is entirely within a cloud environment. There are no in-house servers. We use Google Workspace/Google Drive with multi-factor authentication (MFA) enforcement and single sign-on (SSO) for major services. Staff laptops use Google SSO with bitlocker enforcement and are configured through group policy. Google anti-phishing is enabled.

Michigan Saves uses Windows Defender Endpoint plus Huntress for windows computers and Sentinel One for Macs as an endpoint detection and response (EDR) solution. The EDR solution includes all domain controllers. To ensure that all endpoints in our network are updated with critical security patches, Michigan Saves relies on Addigy MDM for Macs and Datto RMM for windows computers. Inbound and outbound firewall logs are maintained for 90 days. All computers are part of the domain. There are no standalone machines or workstations.

For file storage, Michigan Saves currently uses both Box and Google Drive. Google Drive is used for files with personally identifiable information, as it is SOC2 compliant, whereas as our version of Box is not.

We believe that 15 staff members use laptops (Dell and HP) and 4 staff members use Apple Macintosh (Mac14.9 and MacBook Pro). There are no desktop computers at Michigan Saves. Core applications include the Microsoft Office (Word, Excel, Powerpoint, OneNote, Access), Foxit Phantom PDF, Zoom Workplace, Monday.com, Hubspot, Cognito, loan origination system (LOS), NGEN project management system, LastPass, ISpring, and Scribe. Three PCs run Windows 10 Pro, while 12 run Windows 11 Pro. The Macs run MacOS. The laptops have purchase dates between May 2021 and January 2025.

Most applications are approved for downloading on to staff computers if staff have a need for the application, approval from management to download it, and it has been scanned for viruses.

14. **What is the volume and specifications of current hardware assets that will be retained post-transition, and indicate whether a hardware upgrade is anticipated during the changeover?**
Michigan Saves has not yet determined if, or how much of, the existing hardware (laptops, monitors, docking stations, etc.) we will purchase from PSC. Our current mix of PCs and Macs range in age from 1 to 4 years old, so we may purchase new hardware. We would ask the IT MSP to assist with asset management, including purchasing and on-site set-up. For printing, we would purchase an off-the-shelf printer/scanner/copier, rather than lease one from a commercial provider. The IT MSP would assist with printer set-up and provide support when there are issues.

15. **Technology Stack: Can you provide an overview of the current IT infrastructure and systems in use (e.g., productivity suite, networking, endpoint management)?**
Please see the response in B.13.

16. **Cloud Strategy: Does Michigan Saves have an existing or planned cloud migration strategy? Are you currently using platforms like Microsoft 365, Google Workspace, AWS, or Azure?**
Michigan Saves does not have a cloud migration strategy and would defer to the IT MSP on the most appropriate solution. We would discuss the cloud migration strategy during the discovery period and include it in the comprehensive transition plan. Michigan Saves uses Google Workspace functions and has AWS for our data warehouse and NGEN platform.

17. **What is the expected licensing and administrative model for Google Workspace and other software platforms, such as centralized or delegated management structures?**
We do not have an answer to the question and defer to the MSP for the most appropriate solution for our situation after the discovery period.

18. **How much data is presently stored on Box and Google Drive, and are there any complexities or challenges associated with the current file structure or sharing permission settings that should be addressed?**
Most of our data is currently stored in Box. Box does not work as well for Mac users, as we have challenges with Mac users often unable to leave comments on files. For sensitive files in Box, we do uses permission settings to restrict access. We only use Google Drive for data with personally identifiable information. Access the to the Google Drive is only available for a few staff, who work with the protected data. In a new Google Drive environment, we would continue to restrict access to certain folders/files through permission settings.

19. **Are there established policies or standards for endpoint management, mobile device management, or data encryption that must be adhered to or newly instituted?**
For network security, Michigan Saves uses Windows Defender Endpoint plus Huntress for windows computers and Sentinel One for Macs as an EDR solution. The EDR solution includes all domain controllers. To ensure that all endpoints in our network are updated with critical security patches, Michigan Saves relies on Addigy MDM for Macs and Datto RMM for windows computers. Michigan Saves has no opinions on any of these EDR solutions. We have them because we are part of PSC's IT environment. We defer to the MSP for the most appropriate solution for Michigan Saves.

20. **Are there current network or firewall configurations that need to be duplicated or advanced within the new IT infrastructure?**
We do not have an answer to the question and defer to the MSP for the most appropriate solution for our situation after the discovery period.

21. **Will your organization necessitate assistance with the integration or ongoing management of third-party applications, such as Monday.com, HubSpot, and AWS, beyond standard access and login support?**
No, we do not anticipate needing the MSP to support third-party applications beyond standard access and login support.

22. **Do staff members utilize single-sign-on (SSO) or multifactor authentication (MFA) mechanisms, and should we incorporate these security measures into the new environment?**

Yes, staff currently use MFA and SSO for major services. These security mechanisms are required in the new IT environment.

23. **What is the current access control and permission model utilized or planned for proprietary systems, and how will these protocols be enforced and/or audited?**
Only two staff currently have access to the proprietary LOS, with one of the staff acting as an administrator. For NGEN, which is the proprietary project management system, all staff have access to it, although not all staff use it. While all staff have access, only a few staff have super administrator privileges. Since both systems are proprietary and managed with assistance from the developer, we do not need the IT MSP to support these systems.

24. **Security Standards: Are there specific cybersecurity frameworks or compliance standards (e.g., NIST, CIS Controls, SOC 2) that Michigan Saves follows or aims to adopt? Are there specific risk thresholds or regulatory requirements (e.g., financial data protection, PHI/PII safeguards) that must be accounted for?**
We have access to personally identifiable financial information, so strong network security is important to Michigan Saves. SOC2 and GLBA are standards that we look for in certain vendors that provide financial services, but not yet required for Michigan Saves. We do not know if there are any specific risk thresholds or regulatory requirements that the IT MSP must account for.

25. **Can you confirm knowledge of compliance standards such as SOC 2 and GLBA, and clarify whether the provider's services will encompass training, the preparation of reports, assessments for review, or if a support role to provide proof of controls is required?**
We usually ask our vendors, such as the LOS vendor, or authorized lenders to provide documentation of SOC2 compliance. As of yet, Michigan Saves has not had to provide SOC2 reports or prepare any assessments. However, our business model may be changing in the future, which may bring SOC2 and GLBA compliance to the forefront. Currently, we do not anticipate the IT MSP having to provide any compliance training, reporting, or support. If we do need such support, then we would look to a separate scope of work for it.

26. **Disaster Recovery: What is the current state of your disaster recovery (DR) and business continuity plans? Are you seeking improvements as part of this engagement?**
Because Michigan Saves is currently within PSC's IT environment, we do not have a disaster recovery or business continuity plan and would welcome the IT MSP's support in creating those plans. (We would currently fall within PSC's disaster recovery and business continuity plans). We do expect at least weekly backups of sensitive data and critical business systems, with testing of successful restoration and recovery every 30 days.

27. **What procedures are in place concerning business continuity and disaster recovery services, including offsite backups?**
Please see the response in B.24.

28. **Have you conducted any recent risk assessments or audits?**
Michigan Saves has not conducted any risk assessments or audits. Our cyber insurance carrier recently conducted a risk assessment and only found minor vulnerabilities, primarily with our website.

29. **What are the known gaps or vulnerabilities in your current setup?**
    We are not aware of any significant gaps or vulnerabilities in our current IT environment.

30. **ITSM Maturity: How mature are your internal ITSM (IT Service Management) practices? Are you looking for help implementing tools like ticketing, asset management, or change control?**
    As noted in the preamble, the IT MSP will be starting from scratch with our IT system. We defer to the IT MSP for the most appropriate solution for ticketing, asset management, and change control that meets our needs and fits within our budget.

31. **Core Drivers: What are the primary business or mission-driven outcomes that Michigan Saves is aiming to achieve with this IT services engagement (e.g., scalability, resilience, cost containment, risk mitigation)?**
    As a small nonprofit green bank, we are most interested in resilience, cost containment, and risk mitigation. Scalability is not an immediate concern, but we do want a strong foundation that allows for it.

32. **What is the current requirement of your organization's internal and external vulnerability scanning routines?**
    We do not have an answer to this question and defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

33. **Does your organization have boundary level security measures implemented against threats like spam, phishing, malware, and ransomware?**
    We presume so. See the response in B.13.

34. **Will there be a requirement to provide staff training on new systems or procedures as an integral part of the service offering?**
    If a new system will be used by staff daily, then staff training would be appreciated. For example, not all staff will know Google Drive, so basic training on its functionality would be expected.

35. **What cybersecurity awareness training programs are currently deployed, and how frequently are phishing simulation conducted?**
    We currently use KnowB4 automated phishing training and testing and staff regularly receive 'fake' phishing emails to test staff. We believe the current frequency of such tests is monthly, although at times, it seems much frequent.

36. **Are there any legacy systems or third-party integrations we should be aware of?**
    As mentioned in the RFP, Michigan Saves maintains a proprietary loan origination system and a project management system (NGEN). While other vendors maintain these systems, our network must be secure enough to protect the personally identifiable information contained within these systems.

37. **How do we manage the legacy OS on the Desktop & Laptop?**

If we purchase new hardware for every staff member, then legacy operating systems will not be an issue. If we only purchase new hardware for some staff members, then we would defer to the IT MSP for the best approach to managing legacy operating systems on the older hardware.

38. **How do we handle the devices that are out of warranty?**
We would work with the IT MSP to develop a policy for this issue and expect the IT MSP to provide annual technology assessment to articulate the planning and execution of scheduled upgrades of hardware and software to manage warranty concerns and avoid obsolescence.

39. **How is the hardware issue being handled either by the Workstations support team or by the local support team?**
We do not have an answer to this question and defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

40. **What are the tools used for accessing the workstations for troubleshooting remotely?**
We do not know what tool the current IT MSP uses. Michigan Saves is fine with whatever tool an IT MSP would like to use to remotely troubleshoot laptops.

41. **How are the file transfers being handled and do we have any SFTP solutions?**
If you are referring the data migration from the existing IT system to the new Michigan Saves IT systems, we defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget. If you are not referring to the data migration, then we do not have an answer to your question.

42. **What is the tool use for connecting to VPN?**
Since Michigan Saves moved all files to the cloud and fully engaged the Google Workspace, we have no need to connect to VPN.

43. **How are we managing the local Admin access & passwords?**
See the response in B.13

44. **Computer level Group Policy implemented on the laptop & desktop? User level group Policy implemented on the laptop & desktop? Computer & user Level Group Policy implemented on Servers.**
We do not have an answer to this question and defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

45. **Do we allow usage of USB devices in the environment? If so what type of devices are allowed?**
Yes. We do not have any policy or prohibitions against USB devices in the environment. Typically, we see docking stations, external cameras, phone chargers, speakers, flash drives, and mice used daily.

46. **How are we managing the printers & scanners?**
See the response in B.14.

47. **Are there any script runs when the user logs in to the desktop to configure default shares & to mount them?**
We do not know. If available, this information will be provided to the winning respondent during the discovery period.

48. **Detailed inventory of physical, virtual and cloud servers in the environment?**
Michigan Saves will provide this information during the discovery period.

49. **Please provide a comprehensive inventory of all relevant systems and equipment.**
Michigan Saves will provide this information during the discovery period.

50. **How are the physical server's warranty and support are covered?**
Michigan Saves does not have any physical servers. We are strictly a cloud-based environment.

51. **What is the Virtualization environment running in the environment?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

52. **Is there any Failover cluster implemented?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

53. **What is the monitoring tool used to monitor the servers?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

54. **What are the alert mechanisms that we use if there is any hardware or utilization issues?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

55. **What are the different types of OS running on servers?**
We are in a cloud environment running Google Workspace.

56. **Is there any legacy OS running on the environment, if so, how are we managing it?**
There is not any legacy OS running in the environment.

57. **Architecture diagrams of the environment connecting multiple sites.**
Michigan Saves will provide this information during the discovery process.

58. **How many domains are there in the environment?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

59. **List of domain controllers and the sites they are hosted on.**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

60. **Default domain policy configurations. Default domain controller policy configurations.**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

61. **OS vendor support information.**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

62. **What is the patching cycle for the environment? How often are operating systems and applications patched? Do you patch third-party applications (e.g., Adobe, Chrome, Zoom)? Do you currently track patch compliance or coverage?**
We do not have an answer to these questions and defer to the IT MSP for the most appropriate solution for our situation and budget.

63. **What is the backup solution used for taking the server backup?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

64. **How many VoIP phones (both physical devices and virtual lines) are expected to be migrated?**
We could need as many as 20 VoIP virtual phone lines migrated to the new IT system. We would not have any physical devices. We are okay with new phone numbers for staff but would need to maintain our main phone line and a toll-free line.

65. **How many conference rooms are available in the current environment?**
The number of conference rooms will be determined when Michigan Saves finalizes it office space in August. If we stay in our current location, PSCs IT MSP will manage conference room technology. If we move to a new location, then we will have one conference room.

66. **What wireless networking solution is currently deployed? How is guest access managed within your existing setup?**
The current IT environment include both password protected guest Wi-Fi access and secure staff Wi-Fi access. We do not know how PSCs IT MSP manages it within the existing IT environment.

67. **Can you share your current network topology and details of your existing remote access solution?**
See response in B.49.

68. **What monitoring tools are currently in use for your IT infrastructure?**
We do not know. If available, this information will be provided to the winning respondent during the discovery period.

69. **What is the network bandwidth commissioned for your branch offices? Who is your current ISP?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

70. **What are the network firewalls that are deployed in your current environment?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

71. **Are there Vendor Contracts, Carriers / ISP /OEM vendor management?**

We do not know. If available, Michigan Saves will provide this information during the discovery period.

72. **Which is the tool used for Network Audit and Compliance reporting**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

73. **Is there any monitoring of PSIRTS and reporting of vulnerabilities?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

74. **Can you share the complete inventory of the network, wireless, including Load balancers, WAN devices, Web Application Firewalls, etc., in scope of network devices support and monitoring?**
See response in B.49.

75. **Is firewall support (security) in Scope? If yes, kindly share the device counts (proxy servers, firewalls, WAF etc.)**
Yes. We would expect the IT MSP to provide firewall support. Michigan Saves will provide a device count during the discovery period.

76. **What are the network OEM vendors Cisco, Palo Alto, Fortinet, etc.?**
We do not know.

77. **Are there any Legacy Network details, in terms of end of life or support? If yes, kindly share the details**
We do not know.

78. **Is there any Network automation currently deployed? If yes, please share the tools details**
We do not know.

79. **How do you currently deploy new software or updates to your endpoints?**
See the response in B.13. Software updates are deployed at a regular cadence, usually during normal business hours. We would like the IT MSP to determine the best time to deploy updates.

80. **Do you have a standardized process for provisioning new systems? How long does it typically take to provision and deploy a new endpoint (from box to user-ready)?**
We do not have an answer to these questions and defer to the IT MSP for the most appropriate solution for our situation and budget.

81. **Are all endpoints encrypted with full-disk encryption?**
We do not know.

C. Project Understanding & Strategy

82. **Pain Points: Can you elaborate on the biggest operational or technical challenges you're currently facing? Where do you feel current support models fall short?**

We do not have any significant operational or technical challenges with the current IT system or with the IT MSP. See the response in A.11 for the biggest technical challenge associated with the transition from PSC.

83. **Transformation Readiness: Is Michigan Saves looking for a "lift-and-shift" replacement of current services or a modernization effort that includes rethinking processes, tooling, or platforms?**
Please see our response in the preamble.

84. **Strategic Priorities: How does this project align with broader organizational initiatives such as growth, digital equity, energy program expansion, or stakeholder engagement?**
Our core LOS and NGEN rely on a strong, reliable, and secure IT system. We cannot function without a strong and secure IT system. As noted in B.29, we are most interested in resilience, cost containment, and risk mitigation within our new IT system. Scalability is not an immediate concern, although that could be future goal. Enterprise resource planning is also a concept that we might explore in the future.

85. **IT Role in Mission: How do you view the role of IT in supporting or advancing the nonprofit's mission and values?**
Please see the response in C.84.

86. **Does your organization necessitate an annual strategic assessment of IT infrastructure and related costs, and what elements are typically covered by this review?**
No, the organization does not necessitate an annual strategic assessment of IT infrastructure. As noted in the RFP, we want an IT partner who can understand our mission and needs and provide strategic guidance and future planning.

87. **Has the existing provider been tasked with evaluating the ROI on technological investments or third-party software engagements?**
We do not know.

88. **Are there requirements for developing or integrating proprietary third-party systems through APIs or alternative methods?**
We do not have an answer to this question and defer to the IT MSP for the most appropriate solution, if needed, that meets our needs and fits within our budget.

89. **What is the existing process to ensure that your IT roadmap includes considerations for scalability and obsolescence planning?**
We do not have an existing process. As noted in the RFP, we want an IT partner who can understand our mission and needs and provide strategic guidance and future planning.

90. **Which of the services listed (e.g., cybersecurity, help desk, network admin, planning) are top priorities?**
Of those options, cybersecurity and network admin are the highest priorities, followed by help desk, and then planning.

91. **Are there any peak periods (e.g., fiscal year-end, reporting deadlines) where IT support needs increase?**
We cannot think of any peak periods where IT support would increase.

D. Service Scope & Success Criteria

92. **Scope Flexibility: Are you open to a phased or modular delivery approach (e.g., separate tracks for cybersecurity, cloud optimization, end-user support)?**
We do not have an answer to this question and defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

93. **Success Metrics: What does success look like from your perspective? Are there KPIs or SLAs you expect to implement?**
Success starts with the transition from the PSC IT environment. We need to keep the @michigansaves.org email address and all existing files need to be successfully migrated into the new IT environment. Success means no downtime in our business. Both LOS and NGEN are available 24x7 and staff must be able support our customers throughout this transition. We will discuss other success metrics during the discovery period.

94. **What are the expected service level agreements (SLAs) and IT support response times that are targeted for this project?**
Michigan Saves staff are not well versed on SLA performance standards and may refine these standards after discussion with the IT MSP.

- *Response Time Standards*
    - *Critical issues (e.g., system-wide outage): Response within 15 minutes*
    - *High priority (e.g., key application failure): Response within 30 minutes to 1 hour*
    - *Medium priority (e.g., individual user issues): Response within 4 hours*
    - *Low priority (e.g., general inquiries): Response within 1 business day*
- *Resolution Time Standards*
    - *Critical issues: resolved within 4 to 6 hours*
    - *High priority: resolved within in 1 business day*
    - *Medium priority: resolved within 2-3 business days*
    - *Low priority: resolved within 5 business days*
- *First Contact Resolution Rate*
    - *80 percent of tickets resolved on the first interaction without escalation*
- *Availability of Support*
    - *24/7 support for critical issues*
    - *8 am to 5 pm, Monday through Friday for all other issues*
- *Call/Email Answer Rate*
    - *90 percent of calls answered within 1 minute*
    - *95 percent of emails acknowledged within 1 hour*
- *Backlog Management*
    - *No more than 5 percent of tickets older than 5 days*
- *Customer satisfaction*

      o   *A positive rating of 90 percent or higher from a post-ticket satisfaction survey*

95. **What are your current metrics for average response time and resolution time regarding help desk inquiries?**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

96. **Which ticketing system do you use for IT support? Do you utilize any Virtual Desktop Infrastructure (VDI) solutions?**
We do not know and defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

97. **Volume of incident & request tickets for Server support.**
We do not know. If available, Michigan Saves will provide this information during the discovery period.

98. **What are the supporting Hours of the Desktop Support team?**
As noted in the RFP, Michigan Saves would expect help desk support from 8 am to 5 pm, Monday through Friday, with 24/7 emergency support available.

99. **Tooling Preferences**: **Do you have preferences or constraints regarding vendors/tools (e.g., ticketing systems, monitoring platforms, security solutions)?**
We have no preference and defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

100. **What tools or systems are presently in place to monitor infrastructure performance, or should these services be included within the scope of the proposed project?**
We do not have an answer to this question and defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

101. **Is the scope of support for AWS accounts specifically related to cloud services, data storage, and application management, or are there additional skills required to support the loan origination application and data warehouses?**
LOS, NGEN, and the data warehouse are supported by vendors that supply and manage the AWS accounts for those applications. We would have to determine what, if any, support, the IT MSP would need to provide for the AWS accounts.

102. **How is procurement for hardware and software assets presently managed, and is there a need for these procedures to be encompassed in the scope, including the tracking and renewal of hardware, software, and licenses?**
The current IT MSP provides asset management for PSC and thus, Michigan Saves. PSC manages laptops on a 4-year lifecycle. We do not know about other IT hardware. Except for user requested applications, like Monday.com, Cognito, HubSpot, etc., the IT MSP manages all licenses and license renewals. Michigan Saves would expect our IT MSP to do the same.

103. **Is there a defined (and documented) "standard build" for user endpoints and server installations? If yes, what is the required software bundle?**

We do not have an answer to this question and defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

104. **How do you currently handle employee onboarding and offboarding from an IT perspective?**

Prior to an employee's first day, Michigan Saves notifies the IT MSP of a new hire and provides the necessary information to configure their laptop, set-up their email and calendar, and add them to the network. On an employee's first day, the new hire meets in-person with a staff member from the IT MSP to receive the laptop and make any final configurations. Currently, the IT MSP provides any required training on our systems, email security, etc.

On an employee's final day, the IT MSP accepts the employee's laptop and transfers any local files to the network. The individual's user profile and email account remain open for 30 days, while email is forwarded another individual. After 30 days, the user profile is removed from the network and the email address is deactivated. The laptop is scrubbed of any personal information and set-aside for future use as a loaner laptop or for another new hire.

E. Relationship & Communications

105. **Point of Contact: Who will be the day-to-day point of contact or technical lead from Michigan Saves during implementation?**

The primary point of contact with be the Chief Operating Officer, Todd Parker.

106. **Governance Structure: Do you have a governance framework for vendor management (e.g., quarterly reviews, joint planning sessions)?**

No, Michigan Saves does not have a pre-determined governance framework for vendors. We would work with the IT MSP to establish a regular cadence of meetings during the first few months of the engagement.

107. **What is your preferred method and cadence of reporting (e.g., monthly reports, dashboards, quarterly reviews)?**

See response in E.80.

108. **Cultural Fit: Are there specific values, work styles, or nonprofit-oriented approaches you look for in a strategic IT partner?**

See attachment A of the RFP.

F. Transformational Services

109. **AI Curiosity: Is Michigan Saves exploring any AI-related initiatives—such as automation of internal workflows, intelligent document processing, or chat-based tools for community outreach?**

No, not currently. We would welcome a conversation with the IT MSP to learn more about AI-related initiatives and how they could improve efficiency without sacrificing customer service.

110. **Innovation Openness: Is Michigan Saves open to leveraging automation, AI, or next-gen monitoring solutions to reduce costs and improve IT performance?**
Potentially. We would welcome a conversation with the IT MSP at the most appropriate time.

111. **Operational AI Use Cases**: **Would you be open to AI-enabled service enhancements (e.g., auto-triage of IT tickets, anomaly detection, AI-powered reporting)?**
See response in C.83 and C.84.

112. **Data Landscape**: **Are there data platforms or reporting workflows that could benefit from AI-based optimization, e.g., forecasting or program impact analytics?**
See response in C.83, 84, and 85.

113. **Innovation Engagement**: **Would you be interested in periodic reviews from our Innovation Lab at Five9nes to surface relevant emerging tech aligned with nonprofit needs?**
As noted in the RFP, we desire an IT partner who can serve as an advisor on our IT strategy, enable us to optimize our existing IT solutions, and assist with decisions about investment in technology. To the extent that emerging technologies are aligned with our needs, we would be open to a discussion. That said, our most important priorities are the transition from PSC and the development of our own IT infrastructure. Discussions on emerging tech will have to wait until our immediate needs are met.

114. **Do you have an existing IT roadmap or technology strategy?**
No, Michigan Saves does not have an IT roadmap or technology strategy. As noted in the RFP, we would like this IT MSP to develop an IT roadmap.

115. **Are there any upcoming IT projects or upgrades planned for the next 12–18 months?**
Other than the transition from PSC and the creation of a brand-new IT environment, there are no planned IT projects or upgrades for the next 12 to 18 months.

116. **Would centralized and automated deployment (e.g., Windows Autopilot or zero-touch imaging) be of interest to you?**
Potentially. We would welcome a conversation with the IT MSP at the most appropriate time.

G. PSC Transition

The following are questions and answers related to the migration of Michigan Saves data from the PSC IT environment to the new Michigan Saves IT environment. Currently, we do not have access to specific information about the size and extent of data that needs to be migrated. As noted in the RFP, we ask respondents to price the transition piece of the RFP (e.g. task 1 in the RFP) on a time and materials basis because of the unknows. During the discovery process, the winning respondent will meet with the current IT MSP and receive all the details about our accounts, files, and data.

Email Migration

117. **How many mailboxes are currently in use?** *(updated response)*

MIchigan Saves has about 25 mailboxes, one for each individual user and several group mailboxes.

118. **What is the average size of each mailbox?**

We do not know. Michigan Saves will provide this information during the discovery period.

119. **What is the current email platform used by PSC (e.g., Google, Microsoft 365, Zoho, custom)?**
Google.

120. **Are shared mailboxes or group aliases included in the migration?**

Possibly, but we are not certain. As for aliases, as noted in the RFP, every staff email address, like tparker@michigansaves.org is an alias for a public sector consultants.com email address, e.g., tparker@publicsectorsconsultants.com. We also have generic email addresses, like registration@michigansaves.org, info@, accounting@, etc. We do not know if these are aliases of a @publicsectorconsultants.com email address. Michigan Saves will provide this information during the discovery period.

121. **Do you need to migrate calendars, contacts, or just emails?**

We need to migrate calendars, contacts, and emails.

Box to Google Drive Migration

122. **What is the total size of content currently stored in Box?**

We do not know the current size of content stored in box. It should be noted that Michigan Saves has a general Box folder, and every staff member has shared Box folder and a private Box folder Michigan Saves will provide this information during the discovery period.

123. **What is the Source for content migration?** *(updated response)*

Box is the largest source of content. Michigan Saves also has a Google Drive through PSCs Google Workspace that will need to migrate to the new IT environment.

124. **What is the destination for Box content migration?**

Google Drive and Google Shared Drives.

125. **Do you want to maintain permissions and sharing settings from Box during migration?**

Yes, if possible.

126. **Do you have any mapping of file/folder structure between Box and Google Drive for each team/user?**

We do not know. Michigan Saves will provide this information during the discovery period.

127. **Do you have any retention or archival policies (e.g., exclude files older than 3 years)?**

We do not know. Michigan Saves will provide this information during the discovery period.

General Google Workspace Information in Destination

128. **Have you already set up a Google Workspace? if yes, are you currently using (e.g., Business Standard, Business Plus, Enterprise)?**

    No, Michigan Saves does not have a Google Workspace of its own. We will defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

129. **How many users are licensed in your Google Workspace tenant?** *(updated response)*

    There are no users licensed in Google Workspace at this time, as Michigan Saves is not a Google Workspace tenant. Our current Google Drive is through PSC and would need to be migrated along with all the files from Box to our own Google Workspace.

130. **Are Shared Drives already created or should we create and assign them during migration?**

    Shared Drives have not been created and would be created and assigned during migration.

Tools and Scope

131. **Do you currently use any 3rd party tools for migration, such as Google Workspace Migrate, CloudM, CloudFuze, MultCloud?**

    We do not have an answer to this question will defer to the IT MSP for the most appropriate solution that meets our needs and fits within our budget.

132. **Is Microsoft 365 also being considered as a potential solution, or is Google Workspace the confirmed destination?**

    Google Workspace is our desired destination.

133. **For Zoom migration? If yes, are you looking to migrate from Zoom to another service like Google Meet or to Zoom?**

    Michigan Saves currently uses both Google Meet and Zoom. We would continue with the mixed approach. Michigan Saves is also part of PSC's Zoom Workplace for VoIP and would need its own Zoom Workplace. As noted in B.64, there are two phone numbers that must be maintained, and Michigan Saves owns both.