Request for Proposal for Managed IT Services

I. Introduction and Purpose

Legal Services of Eastern Missouri ("LSEM") is soliciting proposals from qualified Managed IT Services Providers ("MSPs") to manage its technology infrastructure, cybersecurity, and end-user support. LSEM's current managed IT services agreement expires on April 30, 2027, and this Request for Proposal ("RFP") is issued to ensure a competitive, transparent selection process is completed well in advance of that expiration.

The objective of this RFP is to select a partner with proven expertise supporting legal services organizations, law firms, and nonprofits, and a deep understanding of the compliance, confidentiality, and operational requirements unique to that environment. The selected MSP will be responsible for maintaining a secure, stable, and proactive IT environment and for helping LSEM plan strategically for its technology needs going forward.

II. About Legal Services of Eastern Missouri

Legal Services of Eastern Missouri is a nonprofit law firm providing free civil legal services to low-income and vulnerable individuals across 21 counties in eastern Missouri. LSEM is a grantee of the Legal Services Corporation (LSC) and, as such, is expected to adhere to LSC's technology and data protection standards.

LSEM currently operates five office locations, employs approximately 115 paid staff, and hosts 10–20 volunteers and/or interns during the fall and spring semester and up to 40 interns during the summer. Under LSEM's current IT services agreement, the environment is sized between 125-150 users and less than 200 workstations.

III. Project Background

With our current agreement approaching expiration, LSEM is issuing this RFP to conduct a competitive bid consistent with LSC procurement expectations. LSEM's Tech Steering Committee — comprising senior management and staff representatives — will lead the review process, as it did during the prior 2021 RFP cycle.

The selected MSP will be instructed to:

- Collaborate with LSEM leadership and the Tech Steering Committee to develop, document, and maintain a multi-year technology roadmap and annual IT budget aligned with LSC standards.
- Conduct regular, structured meetings with LSEM leadership reviewing service desk performance against Service Level Agreements (SLAs), security posture, and progress against the technology roadmap.
- Propose and contractually commit to clear, measurable SLAs for ticket acknowledgment, response, and resolution, categorized by priority level, with monthly performance reporting.
- Provide unlimited remote support via a centralized ticketing system, telephone, and email during LSEM's standard business hours (to be defined), with a documented process for after-hours/emergency support for critical outages.
- Assign a primary and secondary technician to the LSEM account and onsite at the primary location to build deep familiarity with LSEM's environment, applications, and users.

- Develop and execute a standardized, checklist-driven onboarding process for new employees, interns, and volunteers (LSEM's current contract accommodates up to 60 intern/volunteer onboardings and off boardings per year), and a secure offboarding/de-provisioning process for departures.
- Provide complete management, proactive monitoring, and maintenance of all network equipment (firewalls, switches, wireless access points) across all LSEM office locations, including configuration management and firmware updates.
- Implement and maintain a comprehensive inventory of all LSEM hardware and software assets.
- Deploy, configure, and manage backup and disaster recovery solutions consistent with LSEM's data protection obligations.
- Deploy, configure, and manage a Mobile Device Management (MDM) solution to enforce security policies and provide remote wipe capability for devices accessing LSEM data.
- Assist LSEM in formalizing and testing its Incident Response Plan, including at least one annual tabletop exercise with leadership and key staff.
- Manage security administration broadly, including breach notification and response, and support LSEM staff in performing an annual risk assessment.
- Serve as first point of contact for troubleshooting core business applications (e.g., case management system) and manage escalations to application-specific vendors as needed.
- Identify and price, as an out-of-scope project list, anticipated initiatives such as: cloud infrastructure changes, print/scan fleet evaluation, office moves or build-outs, and integration with new business software.

IV. RFP Timeline and Key Dates

LSEM has established the following schedule for this RFP process. While LSEM will endeavor to adhere to this timeline, it reserves the right to amend it at any stage. All deadlines are based on Central Time (CT), unless otherwise noted.

Activity / Event	Target Date
RFP Issued	September 2, 2026
Deadline for Vendor Questions	September 16, 2026
LSEM Responses to Questions Published	September 23, 2026
Proposal Submission Deadline	October 14, 2026
Finalist Presentations to Tech Steering Committee	Week of October 26, 2026
Reference Checks	First two weeks of November 2026
Vendor Selection / Notification	November 20, 2026
Contract Negotiation	Late November – December 2026
LSC Review Period (as applicable)	30 days
Contract Execution	January 2027
Onboarding / Transition Period	January 1 – April 30, 2027

New Contract Start Date	May 1, 2027

V. Compliance and Regulatory Context

As a recipient of funding from the Legal Services Corporation, LSEM is expected to meet the standards outlined in the LSC Technology Baselines, as well as the ABA Standards for the Provision of Civil Legal Aid, particularly Standard 4.10 concerning the "Effective Use of Technology."

The selected MSP will be a critical partner in ensuring LSEM achieves and maintains compliance with these standards, including but not limited to controls related to data protection, encryption, access control, backups, disaster recovery, incident response, and technology vendor due diligence. Vendors should also be prepared to address relevant standards such as NIST 800-53 (moderate baseline), PCI, and HIPAA where applicable to LSEM's environment.

VI. Overview of Current IT Infrastructure

The following summarizes LSEM's IT environment as of the last available documentation.

Technology Component	Details
Number of Users (current floor per 2022 contract)	115 (minimum)
Number of Managed Computers (current floor per 2022 contract)	200 (minimum)
Number of Offices	5 - Peabody, Old North, Clayton, Hannibal, Union
Servers	Hybrid on-prem/cloud-based server environment
Primary Productivity / Email Suite	Microsoft 365
File Storage	Moving from on prem to structured SharePoint
Network Hardware	UniFi Ubiquiti switches/access points PaloAlto Firewalls
Phone System	Dialpad
Backup / Disaster Recovery	Windows Server backed up to local Network Attached Storage (NAS) and offsite storage
Endpoint Security (AV/EDR)	Huntress Identity Threat Detection and Response (ITDR)
Current Incumbent Vendor	ArchTech, LLC

VII. Vendor Qualifications

To be considered for this engagement, bidders must meet the following minimum qualifications:

- Continuous operation as a Managed IT Services Provider for at least four years.
- Demonstrated ability to provide on-site support to LSEM's Missouri office locations within a reasonable timeframe for emergency situations (e.g., same business day for critical outages).
- Proof of adequate Cybersecurity (E&O/Tech E&O) and Commercial General Liability insurance coverage.
- Compelling evidence of experience and expertise working with legal services organizations, law firms, or nonprofits with comparable compliance and data confidentiality requirements.
    - Experience working with LSC funded organizations strongly preferred.
- Specific examples or case studies illustrating how the vendor has tailored services, support processes, and strategic advice to legal or nonprofit clients' workflows, case management software, and regulatory pressures.
- A list of security standards and frameworks the firm adheres to or implements for clients.

VIII. Proposal Content Requirements

All proposals must be organized in the following structure and include all requested information:

A. Company / Vendor Overview

- Legal name, address, phone number(s), and website
- Federal and state Taxpayer ID numbers
- Length of time in business, size, and organizational structure
- Length of time providing managed IT services in current form
- Total number of clients, with a breakdown of nonprofit-sector and legal-services clients specifically

B. Point of Contact

- Name, title, email address, and phone number of the person(s) authorized to represent the firm

C. Insurance and Security Standards

- Types of insurance carried, including cybersecurity insurance
- List of security standards/frameworks the firm adheres to or implements

D. Technical Approach and Service Delivery Model

A detailed narrative describing how the services outlined in Section III will be delivered, including:

- A detailed 90-day onboarding and transition plan (including transition from the incumbent vendor)
- Service desk methodology, including ticket prioritization and escalation procedures
- Helpdesk support availability (days/hours), onsite support, after-hours support process, and definition of emergency/critical issues
- Response and resolution time commitments by priority level, and any limits on ticket submissions
- Tools and platforms used for Remote Monitoring and Management (RMM), ticketing, and security management
- Security framework(s) implemented for clients and specific measures to protect LSEM's technology and data

E. Proposed Team Structure

- Organizational chart of the dedicated account team, including biographies, roles, responsibilities, and relevant certifications for the Account Manager, and primary/secondary support technicians
- Location(s) of office(s) that will service the LSEM account

F. Client References

- A minimum of three client references, with at least two from legal aid or nonprofit organizations of similar size and complexity to LSEM. Include contact name, title, organization, phone number, and email address, and a brief summary of services provided.

G. Detailed Cost Proposal

The proposal must provide a clear, itemized breakdown of all costs, distinguishing between:

- Recurring monthly fees (e.g., per-user or per-device costs for the complete service package)
- One-time fees for onboarding, migration, or specific projects
- A schedule of hourly rates for out-of-scope project work, and the firm's billing approach for such work
- A list of anticipated "project work" costs not included in the base proposal (e.g., SSO migration, cloud server migration, copier/scanner evaluation, office moves, phone system evaluation), consistent with the anticipated initiatives noted in Section III
- Any factors that may cause pricing to change within the contract term, and any discounts available for longer contract terms

H. Sample Documents and Disclosures

- A sample or draft Master Services Agreement (MSA) or Service Level Agreement (SLA) document, reflecting a proposed 3-year contract term
- A sample invoice, if pricing is not fully fixed-fee
- A statement that the proposal and cost schedule are valid for 60 days following the proposal due date and will become part of the negotiated contract
- A statement disclosing any financial benefit the firm would receive from recommending, selling, or providing specific hardware, software, or services to LSEM, so LSEM can assess any conflict of interest
- An explanation of any contract termination for default or similar incident within the past five years (or a declaration that none occurred), including the name, address, and phone number of the affected party if applicable
- A description of scope of services beyond this RFP that may interest LSEM, particularly ideas focused on cost savings or efficiency
- A list of issues or areas the firm will not support

IX. Evaluation Process

LSEM's Tech Steering Committee will conduct an impartial evaluation of all complete proposals received by the deadline. The committee is designed to include a diverse group of LSEM staff and senior management, reflecting a range of roles, backgrounds, and technical familiarity. The selection process is intended to identify the provider

offering the best overall value and closest alignment with LSEM's strategic objectives. While cost is a factor, it is not the primary determinant.

Evaluation Criteria	Weight	Description
1. Experience with Legal Aid / Nonprofit Sector	35%	Demonstrated understanding of legal workflows, LSC/ABA compliance requirements, client data confidentiality, and nonprofit operating constraints. Quality and relevance of client references.
2. Technical Approach and Service Delivery Model	25%	Comprehensiveness and feasibility of the proposed solution across the full scope of services, including onboarding/transition plan, helpdesk methodology, and security posture.
3. Cost and Value	25%	Clarity, completeness, and reasonableness of pricing. Overall value relative to cost. Cost is a factor but not the sole determinant.
4. Team Qualifications and Experience	10%	Expertise, certifications, and continuity of personnel assigned to the LSEM account.
5. Local/Regional Presence and Responsiveness	5%	Ability to provide timely on-site support across LSEM's Missouri office locations.

X. Selection Process

1. Initial Review: Proposals will be reviewed upon receipt to confirm they meet all submission requirements. Non-conforming proposals may be rejected.
2. Committee Evaluation: The Tech Steering Committee will score all conforming proposals against the criteria in Section IX.
3. Finalist Selection: A short list of the highest-scoring bidders will be identified.
4. Presentations: Short-listed bidders will be invited to a presentation with the full committee.
5. Reference Checks: LSEM will conduct reference checks for top-ranked finalist(s).
6. Final Selection and Notification: A recommendation will be made to LSEM senior management, and the successful bidder will be notified to begin contract negotiations.

XI. Submission Instructions and Contact Information

Proposals must be submitted electronically in PDF format.

- Submission Email: klbristow@lsem.org
- Email Subject Line: “RFP Response for Managed IT Services – Legal Services of Eastern Missouri”
- File Naming Convention: [Your Organization Name]_Managed IT Services RFP_Proposal.pdf
- Deadline: All proposals must be received by the date and time specified in Section IV. Late submissions will not be considered.

All communications and questions regarding this RFP must be directed in writing to the following sole point of contact:

Name: Karen Bristow

Title: Director, Information Technology

Email: klbristow@lsem.org

To preserve a fair and transparent process, no contact should be made with any other LSEM staff or board members regarding this RFP.