



Alberta Dental
Association

ADA Managed IT & Telecom Services

Request for Proposal

July 2024

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ADA Managed IT & Telecom Services - Request for Proposal

Introduction to the ADA

The Alberta Dental Association (ADA) is seeking proposals for comprehensive technology and telecom services to support in-person and hybrid work environments. This includes all necessary hardware, software, support, and telecom solutions.

About the Association

The ADA is the association that strengthens and supports the dental professions by being the collective voice of Alberta dentists.

Association Mission

Healthy Dentists, Healthy Albertans.

Association Values

Approachable

We value openness and inclusivity and treat our stakeholders as family, friends, and neighbours.

Supportive

We foster a respectful and safe environment where all people are welcomed and heard.

Accountable

We hold ourselves and each other to being informed, honest, transparent, and results-focused in pursuit of our vision.

Background

Launched in 2023, the ADA is a newly “re-formed” organization supporting over 2800 Alberta dentists. Since then, it has operated as a virtual organization with a small staff team working from home offices, and an active Board of Directors comprised of elected member dentists.

The ADA has recently secured a new physical office location at 9804 Jasper Ave., Edmonton, Alberta (Alberta Hotel). The organization will take possession of the new space in September 2024 and require a seamless integration of in-person and hybrid work capabilities.

Purpose

The objective of this RFP is to identify a qualified vendor to provide technology and telecom services that enhances the ADA's operational efficiency, support remote work, and ensure robust and secure communication systems.

Scope of Work

Overview of Current ADA Technical Environment

The ADA is scaling up to become the trusted voice of dentists in Alberta. We are currently a team of 9 staff and 9 board members that work in a PC environment,

Technology & Telecom Services Required

- **Remote backup** – Executing scheduled plan for the critical servers, including a regularly-tested recovery process.
- **Technology strategy planning** – Working with current staff to develop a long-term strategic technology plan. The plan will take advantage of new and existing technologies to produce a pragmatic and effective future roadmap that enables the ADA to fulfill its mission.
- **Solution design** – Solution packages (e.g., hardware, software, licensing) and associated consolidation of data.
- **Network and email system monitoring** – 24/7 monitoring of ADA's network and email services with proactive communication and escalation protocols based on the severity of any unscheduled outages.
- **Cyber Security and Protection:** Provide comprehensive cyber security services to safeguard our organization's digital assets against threats and vulnerabilities.
- **Risk Mitigation & Controls:** Develop and implement robust risk mitigation strategies and controls to minimize potential security risks and ensure compliance with industry standards.
- **Training for Users:** Deliver effective and engaging cyber security training programs for users to enhance their awareness and ability to identify and respond to security threats.
- **Procurement management** – Selection of commercially rated equipment, order placement, order tracking, shipping, equipment returns, and sourcing and ordering of replacement parts.
- **Move, Add, Change** – Changes to the location or configuration of existing equipment or software, and installation of additional equipment or software.
- **Warranty, break fixes and installation** – Planned and on-call services, including emergency response to server issues.
- **Technical support** – Ability to support ADA's inquiries as required, via help desk, including support for remote users.
- **Reporting and communication** – Ensuring monthly reporting on all purchases, assets, current activities and issues, and project status reports.
- **IT policy review and development** – Development of customized policies related to the use of technology.
- **Unit evaluation and testing** – Formal evaluation of new hardware
- **Implementation planning and guidance** – Assistance in deployment planning and execution.
- **Image development and management services** – Assistance in planning and designing standard images.
- **Image loading** – Prior to delivery and installation.
- **Configuration** – Full assembly of hardware and software, including testing and burn-in.
- **PC deployment** – Delivery and setup of machines on-site.

- On-site implementation of business applications – Installation of non-image software.
- Asset inventory management – Tagging, tracking, and management of warehousing and inventory.
- Life cycle management of hardware units – Process for end-of-life notification, replacement, and asset decommissioning/disposal.
- Software licensing control – Advice on software licensing needed for the ADA, specific to user needs and roles. Oversight of automatic renewal of software applications and maintenance of appropriate documentation
- Warehousing – Maintain an inventory of standard stock units on behalf of ADA.
- Onboarding – New employees onboarding in relation to technical services.
- Telecom solutions – New location fresh approach to telecom.

Technical Requirements

Hardware:

- Workstations and Laptops: Specifications for in-person and remote employees.
- Networking Equipment

Software:

- Productivity Tools: MS licenses. Microsoft Office 365- Microsoft 365 Business Premium and Microsoft 365 F3, Adobe
- Communication Tools: Zoom (meetings and webinars) and Teams.
- Learning management system (LMS) procurement and integration: TBA
- Customer relationship management (CRM): Member Lounge by Grype Digital is a membership management software ADA currently uses.
- Website – WordPress, hosted through FullHost

Telecom:

- Currently using Bria VOIP and Planet Telecom for incoming calls. Looking for another provider with increased quality, user control and easy access for mobile employees.
- most outgoing calls are the staff with their own devices.

Scalability:

- Solutions must be scalable to support future growth.

Proposal Requirements

For the purposes of understanding more about your organization and your ability to successfully fulfill this important service for the ADA, please provide the information below as part of your response, clearly referencing each specific question.

Organizational Information:

1. Provide a concise summary of your organization's role in delivering IT value-added services in the market.
2. How long has your organization been operating in this industry?
3. List the Alberta locations where your organization has offices.
4. State the total number of employees in your organization. How many of these are focused on account management and/or technical support?
5. How many of your employees are full-time versus on contract?
6. Describe your partnerships and experience with manufacturers and major distribution partners within the Canadian technology sector.
7. What sets your organization apart from your competitors, and how is this distinction relevant to us?
8. Will you outsource any parts of the proposed solution to third-party organizations? If yes, detail the components to be subcontracted, the agreements with subcontracted firms/individuals, and summarize past successful collaborations.
9. Describe your organization's experience in transitioning clients from traditional IT service models to public or private cloud technology.
10. Provide details of three current customer accounts with similar scope and requirements to those of the ADA.

The Proposed Solution:

1. Please provide a proposed work plan for a migration to your organization as an ADA vendor. Specifically, include the following information:
 - a. Key activities
 - b. Timing
 - c. Information/resource requirements from ADA
 - d. Deliverables
 - e. Key milestones, checkpoints, and other decision points
2. If we decide to move forward with your organization, what ADA resources would you need (e.g., information, data, staff resources, communication) during the migration and on an ongoing basis?
3. Describe your experience in delivering the following value-added services:
 - a. Remote backup

- b. Technology strategy planning
 - c. Solution design
 - d. Network and email system monitoring
 - e. Cyber Security and Protection
 - f. Risk Mitigation & Controls
 - g. Training for Users
 - h. Procurement management
 - i. Telecommunications
 - j. Move, Add, Change (MAC)
 - k. Warranty, break fixes, and installation
 - l. Technical support, including remote user support
 - m. Reporting and communication
 - n. IT policy review and development
 - o. Unit evaluation and testing
 - p. Implementation planning and guidance
 - q. Image development and management services
 - r. Image loading
 - s. Configuration
 - t. PC deployment
 - u. On-site implementation of business applications
 - v. Asset inventory management
 - w. Life cycle management of hardware units
 - x. Software licensing control
 - y. Warehousing
 - z. Describe your experience in providing server technology and services for your customers, focusing on planning, implementation, and ongoing support.
4. Can you provide specific examples of how you have worked with customers that started with significant technology limitations and helped them successfully transform into organizations with well-planned and executed technology strategies? What were the critical success factors in this transformation?
5. How can we be confident that hardware pricing levels will be aggressive and remain highly competitive over a multi-year period during which new models may be introduced?

Support

1. Please explain your technical support options, including how users can request help, the escalation process, support hours, response times, staffing levels, staff expertise, and the physical location of your help desk.
2. Provide information on your standard reporting capabilities.
3. Describe the documentation and support materials available, such as user manuals, online help, interactive demos, web-based seminars, and an online knowledge base, both from a technical and end-user perspective.
4. What training options are available for our staff, including both user training and technical training?
5. Describe any user groups, websites, newsletters, conferences, or other methods you use to share information and gather service feedback.
6. How do you monitor customer satisfaction and quality assurance on an ongoing basis, and how can we benefit from this process?
7. The ADA user base has varying levels of technical expertise. Please describe your experience in effectively supporting remote users with limited technical skills.

Pricing:

Detailed cost breakdown in Canadian funds, including recurring costs.

1. Describe the pricing model(s) you typically use for your standard services.
2. What is the standard markup for the following technology units:
 - a. Desktops
 - b. Laptops
 - c. Servers
 - d. Other hardware
 - e. Software
3. Please provide the charges for the following services in Canadian dollars, including the key cost drivers and whether each service is a standard per-unit cost or charged on an ad hoc basis:
 - a. Remote backup
 - b. Technology strategy planning
 - c. Solution design
 - d. Network and email system monitoring
 - e. Procurement management
 - f. Move, Add, Change (MAC)
 - g. Warranty, break fixes, and installation
 - h. Technical support
 - i. Reporting and communication
 - j. IT policy review and development
 - k. Unit evaluation and testing
 - l. Implementation planning and guidance
 - m. Image development and management services
 - n. Image loading
 - o. Configuration
 - p. PC deployment
 - q. On-site implementation of business applications
 - r. Asset inventory management
 - s. Life cycle management of hardware units
 - t. Software licensing control
 - u. Warehousing
4. Do you offer service bundles? If so, describe how bundling affects pricing.

References:

References of two or more comparable clients whom we can contact regarding service.

Proposal Communication & Submission

Contact

Carmen Sheridan is the designated ADA representative for this initiative. For any information relative to this RFP, please direct all inquiries to her contact information is as follows:

Alberta Dental Association
 Attention: Carmen Sheridan, Education & Technology Strategy Director
csheridan@albertadentalassociation.ca
 Deadline for submission is August 5, 2024 @ 11:59 MST.

Submission Guidelines: Electronic PDF or Word Document by email

RFP Schedule

The ADA reserves the right to suspend, cancel or alter the below schedule at any time.

| Milestone | Date |
|--|----------------------------|
| RFP Release | July 16, 2024 |
| Questions Deadline | July 30, 2024 |
| Submission Deadline: | August 5, 2024 @ 11:59 MST |
| Proposal Review & Selection | August 5-9, 2024 |
| Requests for further info or meeting with potential provider | August 12-16, 2024 |
| Decision Date | August 20, 2024 |

RFP Evaluation & Selection Criterion

Only complete proposals will be considered, the ADA will use multiple criteria to select the most appropriate partner. Respondents are encouraged to be as creative as possible. The following list summarizes the major qualitative areas that will be evaluated, along with their overall weighting.

- Industry expertise and experience
- Demonstrated customer service quality and support
- Previous relevant experience
- Vendor strength and stability
- Account management
- Reporting capabilities
- Financial considerations

The selection committee will consist of the CEO and Director of Education and Technology Strategy. Candidates who progress to the interview stage will be contacted accordingly. We will hold presentations/demonstrations with one or more firms on the Presentations dates indicated in the RFP

schedule. The presentations will be held at the ADA office at 9804 Jasper Ave, Edmonton, Alberta and we will endeavour to provide the successful firms with as much advance notice as possible.

We will engage in contract negotiations with the selected proponent. If an acceptable contractual agreement cannot be reached with this proponent, the second preferred proponent may be chosen, and negotiations will proceed with them. The ADA reserves the right to withdraw from negotiations with any potential service provider at any time and without liability.

Terms and Conditions

By submitting a proposal, each proponent acknowledges and confirms that they have read, understood, and accepted the information contained in this RFP and agree to the following terms:

Eligible Proponents

This RFP is open to all qualified vendors.

Proposals

Must be in electronic format.

Late Proposals

Late proposals may not be considered.

Follow up

We will notify all proponents when upon the conclusion of the RFP process.

Expenses

Proponents are solely responsible for all expenses in participating in the RFP process, including costs in preparing and submitting proposal.

Conflict of Interest

By the closing date, proponents must fully disclose in writing to the ADA any actual, potential, or perceived conflicts of interest related to their proposal and the ADA, along with plans to mitigate such conflicts. The ADA reserves the right to reject any proposal if, in their opinion, the proponent is, may be, or may appear to be in a conflict of interest.

Ownership of Proposals

All proposals and accompanying documents submitted to the ADA in relation to this RFP become the property of the ADA and this RFP, will be held in confidence. They will not be returned.

No Commitment to Contract

Submitting a proposal does not obligate the ADA to accept any proposal or to proceed with the project. The ADA reserves the right to accept or reject any or all proposals, in whole or in part. Additionally, the ADA reserves the right to suspend, cancel, and/or reissue all or any part of this RFP at any time, for any reason, without penalty.

Confidentiality

All proposals and communications between each organization and the ADA regarding the RFP process are confidential and will be securely maintained by the ADA. However, information gathered by the ADA

during the RFP process may be shared with individuals or entities overseeing the RFP process. Proponents should specify any confidential or proprietary information in their proposals.

Compliance

The ADA reserves the right to waive minor non-compliance by a proponent with RFP requirements. This allows the ADA to consider, and potentially accept a proposal which is advantageous even though the proposal may have minor non-compliance.