

REQUEST FOR PROPOSALS

For:	Managed IT Services with Embedded On-Site Staff
Issued by:	Legal Services of the Hudson Valley
Date:	October 22, 2025
Questions Due by:	November 7, 2025
Due Date:	November 28, 2025
Anticipated Start Date:	January 1, 2026 or as soon thereafter as possible

Legal Services of the Hudson Valley (“LSHV”) is a nonprofit legal services provider with over 260 staff operating across more than 10 physical offices. We are seeking proposals from qualified Managed Service Providers (MSPs) to provide comprehensive IT support and VCIO services.

LSHV’s preferred model includes the MSP embedding two full-time employees on site at our White Plains, NY office. However, LSHV will also consider alternative models proposed by vendors that achieve our cost objectives and demonstrate equal or greater effectiveness in meeting LSHV’s needs.

The selected vendor will serve as a strategic IT partner, supporting day-to-day technical needs, maintaining system reliability and security, and ensuring that our staff have the tools and support necessary to deliver high-quality legal services.

The selected vendor must have proven experience deploying and managing cost-effective services and technology to maximize efficiency, optimize resources, and ensure robust security. The MSP should provide tools that allow LSHV to be an innovator and leader among nonprofits, leveraging limited resources to enhance access to civil legal services through cutting-edge IT solutions.

Scope of Services

The MSP will be responsible for delivering end-to-end IT support, including but not limited to: On-Site Embedded Support (Preferred Model) Note: While this embedded staffing structure is preferred, LSHV will also evaluate and consider alternative models that demonstrate equivalent service coverage that includes unlimited as-needed on-site support and organizational benefit.

i. Provision of full-time, dedicated IT staff embedded at one of LSHV's White Plains offices, fully funded by the MSP and included in the monthly agreement:

Help Desk Staff: Responsible for Tier 1 and Tier 2 user support, help desk ticket management, device deployment, and day-to-day troubleshooting for staff.

On-Site Technology Manager: Responsible for higher-level IT management including Tier 3 user support, coordination of system-wide projects, advanced troubleshooting, and oversight of the MSP's Help Desk Staff, and who will coordinate and work closely with internal LSHV IT staff
On-site MSP staff to travel to and support regional offices with IT support as needed
Clear escalation paths for advanced support and system-wide issues

Help Desk and End-User Support

- i. 24/7/365 help desk support, at a minimum available via phone and email, with a ticketing system
- ii. Tiers 1, 2, and 3 support for approximately 260 staff, in addition to volunteers and interns, across multiple offices
- iii. Remote support for staff working in hybrid/remote environments
- iv. Service Level Agreements (SLAs) for response and resolution times
- v. Proactive monitoring of help desk and IT systems Infrastructure Management & Deployment
- vi. Network administration (wired and wireless)
- vii. Server, storage, and cloud environment management
- viii. Backup and disaster recovery planning/testing
- ix. Device lifecycle management (procurement, deployment, maintenance, and retirement)

- x. Support for Cisco Meraki servers and networking equipment
- xi. Planning and execution of organization-wide system and application deployments

Security & Compliance

- i. Endpoint detection and response (EDR)
- ii. Patch management and secure deployment of updates
- iii. Email and data security, including phishing protection and Mimecast administration
- iv. Compliance with legal industry and nonprofit security standards (e.g., HIPAA, data privacy, client confidentiality)
- v. Perform annual risk assessments and gap analyses across infrastructure, applications, and processes, and test Incident Response Plan by completing tabletop exercises or other testing as required by LSHV Funders and/or cybersecurity best practices

VCIO Services

- i. Strategic Planning & Governance

Develop and maintain a technology roadmap aligned with business goals and budget cycles
Conduct quarterly strategic reviews with executive leadership to assess progress and adjust priorities

Provide IT governance recommendations, including compliance, data protection, and risk mitigation strategies

Lead annual IT budget planning, forecasting future investments and cost-saving opportunities

- ii. Risk Management & Security Oversight

Recommend and oversee disaster recovery and business continuity planning, and refinement of an Incident Response Plan

Advise on cybersecurity posture, including policy development and incident response planning

- iii. Technology Advisory & Innovation

Evaluate emerging technologies and provide innovation recommendations tailored to business needs

Advise on vendor selection and contract negotiations for major IT initiatives

Support digital transformation initiatives, including cloud migration, automation, and modernization

Reporting & Metrics

Deliver executive reports summarizing IT performance, risks, and strategic initiatives quarterly and as requested

Track and report on KPIs such as system uptime, ticket resolution times, and project milestones

Provide ROI analysis for major IT investments and initiatives

Stakeholder Engagement & Communication

Act as a liaison between IT and LSHV's senior management, translating technical concepts into actionable vision for a civil legal services organization

Facilitate strategic tabletop exercises to align technology with operational workflows

Application & Platform Expertise

The MSP must provide full support, administration, and deployment for key applications and platforms, including third-party software such as:

- i. Microsoft 365 (Teams, OneDrive, Exchange, etc.)
- ii. SharePoint Online, our knowledge and document management system that is integrated with our case management system, LegalServer, e.g.:

Management of permissions and access controls

Integration with Microsoft Entra (Azure AD) to ensure secure, role-based access

Troubleshooting and resolution of user permissions issues

Development and customization of internal tools, workflows, and dashboards to improve staff collaboration and efficiency

Ongoing governance, data retention policies, and best practices for a secure and effective SharePoint environment

LegalServer case management system

- iii. Third-party software related to legal practice, e.g., MatLaw, Best Case, and Cerenade, and business operations, e.g., AvidXchange, Asset Panda, and CodeTwo

- iv. Mimecast email filtering/security
- v. Meraki networking and server equipment
- vi. Konica Minolta printers and cloud-based printing solutions, including PaperCut Hive for print management and monitoring (configuration, deployment, troubleshooting, and workflow optimization)
- vii. Ability to build out or provide asset management, internal IT and internal facilities ticketing systems to LSHV

Strategic IT Planning

Collaboration with LSHV's Internal IT Department to align IT initiatives with organizational goals
Recommendations for technology modernization, efficiency improvements, and cost-saving measures

Identification of cost-efficient platforms, software, and workflows to reduce overall IT expenditures without sacrificing functionality or staff productivity

Budget forecasting and cost optimization strategies, including evaluation of alternative platforms or licensing models

Roadmapping for future technology deployments, implemented in a manner that balances performance, reliability, and cost-effectiveness

Organizational Environment

Approximately 260 staff members as well as additional volunteers and interns

More than 10 physical office locations throughout the Hudson Valley with offices in White Plains, Yonkers, Nanuet, Peekskill, Mount Vernon, Poughkeepsie, New Windsor, Monticello, Goshen and Kingston. Hybrid/remote work environment for some staff

Routine vs. Large-Scale Project Work.

Bids must include the following as part of the Monthly MSP Fee.

- Help desk support (Tier 1–3)
- Support from at least two embedded staff or equivalent coverage under an alternative model

- Routine maintenance, monitoring, and patching
- End-user support (password resets, software troubleshooting, connectivity issues, device setup)
- Permissions adjustments and troubleshooting in Microsoft 365, SharePoint, and Entra
- Creation and deployment of new internal tools, workflows, dashboards, and automations in SharePoint/Entra
- Addition and support of new software solutions adopted by LSHV
- Device procurement, imaging, deployment, and lifecycle management
- Printer management, including Konica Minolta support, cloud printing, and PaperCut Hive monitoring, optimization, and troubleshooting
- Routine staff training sessions, onboarding support, and documentation
- Small- to mid-sized projects, updates, or tool builds requiring fewer than 50 hours of IT labor
- Routine evaluation and implementation of cost-saving platforms, tools, and workflows to reduce IT expenditures

Billable Add-Ons (Large-Scale Projects)

LSHV seeks a predictable IT budget with minimal add-on costs. The MSP contract is expected to cover all routine support, maintenance, and small to mid-sized projects under the all-inclusive monthly fee.

Projects may be considered out-of-scope only if they meet all of the following criteria:

- i. Require more than 50 hours of IT labor for a single, discrete initiative; and
- ii. Involve new platforms or technologies not currently in use by LSHV; and
- iii. Demand specialized planning, scoping, or deployment beyond standard support; and
- iv. Are explicitly identified and approved in writing by LSHV prior to commencement

Examples of out-of-scope projects may include:

- i. Full migration to a new case management system
- ii. Complete server or data center replacement

- iii. Deployment of enterprise-wide platforms not currently used by LSHV

No project may be billed as out-of-scope unless LSHV has provided written approval in advance. Routine tool building, workflow automation, and system updates are included in the monthly fee unless they meet the criteria above. The MSP must provide a detailed scope and cost estimate for any proposed large-scale project before work begins.

Proposal Requirements

Proposals should include the following information:

- Company Profile
- Years in business, size, ownership and organizational structure.
- Experience providing IT services to nonprofit or legal services organizations (if applicable).
- Approach to Staffing and On-Site Support
- Plan for staffing at least two full-time embedded staff or proposed alternative structure.
- Escalation procedures and coordination with off-site teams.
- Explanation as to how MSP will coordinate and work with internal LSHV IT staff (currently a staff of 2)
- Coverage for regional offices.
- Service Delivery Model
- 24-hour help desk support operations (staffing, coverage, SLAs, escalation tiers) with description of how after-hours and on-site support would be provided.
- Security protocols
- Monitoring and reporting practices
- Approach to device, application, and system deployment
- Approach to SharePoint and Entra administration, including permissions management, internal tool development, and workflow automation
- Approach to supporting third-party software, Konica Minolta printers, PaperCut Hive, and cloud-based printing solutions
- Demonstration of cost-conscious IT management and proactive identification of efficiency and cost-saving opportunities
- Pricing model should reflect an all-inclusive monthly fee covering all routine support and tool building, must include two full-time, embedded in-house IT staff (or equivalent alternative model), and detail on the hourly rate for large-scale projects that might be billed separately, if pre-approved with transparent breakdown of costs.
- VCIO Services

Evaluation Criteria

- Ability to provide a minimum of two embedded full-time IT staff, or a compelling alternative staffing model
- Demonstrated expertise with Microsoft 365, SharePoint (permissions, workflows, tool building), and Microsoft Entra
- Proven ability to support whatever third party software LSHV is utilizing, which at present includes Best Case, LegalServer, Cerenade, AvidXchange, Asset Panda, Konica Minolta printers, PaperCut Hive, and cloud-based printing solutions, as well as ability to assist LSHV in assessing new third party platforms to address organizational need
- Ability to deliver both routine support and continuous workflow improvements without additional cost
- Demonstrated experience in cost-conscious IT management, including identification of cost-saving platforms, tools, and workflow improvements
- Ability to provide true 24/7/365 help desk support
- Clear alignment with LSHV's internal IT Team, who will take lead on IT strategy and will act as primary liaison between LSHV senior staff and MSP
- Experience managing enterprise-wide technology deployments
- Prior experience working with federally funded civil legal services organizations preferred
- Breadth and quality of services offered
- Security and compliance expertise
- Cost-effectiveness and transparency of pricing, including annual SOC or other increases (if applicable) per contract year
- Case studies of routine tool building and workflow improvements included in flat-fee models
- Completion of Table 1, with detailed description of proposed services
- At least three references from organizations of comparable size/complexity

Questions due by November 7, 2025 and should be directed to Ray Simons, Senior Director of Operations at rsimons@lshv.org

Table 1 – Comprehensive Service Summary

#	Item	Description of Services
1	End User Support	Field support requests from staff, volunteers, and interns across all offices and remote environments

2	WAN & Circuits	Manage Meraki networking equipment and oversee primary/backup internet and telephony connections between sites
3	Local Infrastructure Support	Maintain any remaining on-premise equipment such as printers, wireless access points, or battery backups at branch offices
4	Email & Security Management	Administer Microsoft 365 (Exchange, Intune), manage mobile phone and device access, spam/phishing filtering, and Mimecast (or alternative)
5	Phone System	Manage telephone systems and coordinate with vendors for service and support
6	Remote Access & VPN	Ensure secure external access with redundancy, including VPN and geo-blocking as needed
7	Domain Registration	Manage the organization's internet domain registrar and DNS settings
8	Security & Updates	Provide MDM, MAM, EDR, antivirus/malware protection, patching, log auditing, data retention/destruction, and intrusion prevention
9	Backup & Recovery	Perform backups for cloud systems, configurations, email, databases, and critical services; manage disaster recovery planning and testing
10	Monitoring	Proactively monitor systems for outages, performance issues, and security alerts across WAN, email, phone, VPN, domain, and backups
11	Documentation	Maintain IT documentation, system credentials, network architecture, licenses, warranties, and service subscriptions

12	Procurement & Vendor Management	Research, negotiate, and manage vendor relationships; escalate product/service issues as needed
13	Conference Room Technology	Manage video conferencing equipment and scheduling systems in meeting rooms
14	MFA/SSO Management	Administer multi-factor authentication and implement/administer single sign-on systems via Microsoft Entra and related platforms
15	Inventory & Lifecycle Management	Track IT assets, manage device handouts, imaging, deployment, and recovery during onboarding/offboarding
16	Branch Office Support	Provide remote and on-site support for technical issues at 10+ regional office locations
17	Office Security Systems	Support video surveillance and fob/swipe card access systems; provide basic troubleshooting before vendor escalation
18	User Lifecycle Management	Provision and revoke access for onboarding/offboarding; manage permissions across systems
19	Equipment Moves	Coordinate and execute IT equipment relocations within and between offices
20	Security Awareness Training	Deliver and manage staff training on cybersecurity best practices and compliance requirements
21	Loaner Device Management	Maintain inventory and availability of loaner laptops and other temporary-use equipment
22	Office365/Azure Hybrid Environment	Manage cloud infrastructure and integrations across Microsoft 365 and Azure services

23	Fax Support	Maintain and troubleshoot any and all fax services as needed
24	SharePoint & Entra Administration	Manage permissions, workflows, dashboards, and internal tools; ensure secure and efficient collaboration
25	Training & Resources	Provide 1:1 and agency-wide training; develop and maintain internal training tools and documentation
26	Requisitioning & Deployment	Procure and deploy new IT tools and software solutions to staff as needed
27	VCIO Services	Provide strategic IT leadership, budgeting, innovation guidance, and alignment with LSHV's organizational goals
28	Routine Tool Building & Automation	Build and deploy internal tools, automations, and workflow improvements within SharePoint/Entra under flat-fee model
29	Cost Optimization & Platform Evaluation	Identify and implement cost-saving technologies, licensing models, and process efficiencies
31	Change Management & Communication	Support rollout of new systems/tools with stakeholder communication, training, and documentation
32	Data Governance & Retention	Assist in developing and enforcing data governance, retention schedules, and secure disposal protocols
33	Incident Response & SLA	Provide guaranteed response times and escalation paths for major incidents or outages
34	Technology Roadmap Alignment	Align IT roadmap with funder expectations and reporting requirements

35	Staff Satisfaction & Feedback	Implement periodic surveys or tools to assess staff satisfaction with IT services
36	Grant & Compliance Reporting Support	Assist with IT-related data collection and reporting for grants and funder compliance
37	Transition and Deployment Plan	Proposed timeline and process for onboarding; Knowledge transfer, documentation, and communication strategy, and plan for future deployments of systems, devices, or applications