

Area Agency on Aging of Palm Beach/Treasure Coast

Request for Proposal (RFP) No. 2026-001

IT Managed Services

Event	Date
Date RFP Issued	January 20, 2026
Pre-proposal meeting	February 2, 2026, 2:00 p.m.
Due date for proposer questions	February 6, 2026
RFP Due Date	February 13, 2026

SECTION 1 GENERAL INFORMATION

Overview

The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. (Agency) seeks sealed proposals from experienced and qualified firms that wish to provide Information Technology (IT) Managed Services for the Agency. Services include but are not limited to personal computer support for Agency employees; server installation, maintenance and repair; management of switches, routers, firewalls, and wireless access points; backup and disaster recovery mechanisms for critical systems; security and protection of Agency systems, including monitoring; and other ancillary services as may be required.

The Agency is requesting proposals for managed services that are based on a fixed monthly price (per user or per device) and inclusive of all aspects listed in the scope of services.

Proposal Submission and withdrawal

The Agency will receive all proposals at the following email address: hvath@aaapbtc.org
Please indicate in the subject line:
RFP #2026-001 IT Managed Services.

**ALL PROPOSALS MUST BE RECEIVED BY
11:59 PM February 13, 2026**

Each proposal shall be prepared simply and economically, providing a straightforward, concise delineation of the firm's capabilities to satisfy the requirements of the Request for Proposal. The emphasis in each proposal must be on completeness and clarity of content. In order to expedite the evaluation of proposals, it is essential that firms follow the format and instructions contained herein. Proposers may phone 561-214-8601 to verify the Agency received the proposal. Proposers may withdraw their proposal submissions by notifying the Agency in writing at any time prior to the deadline for proposal submittal. After the deadline, proposals become a public record of the Agency and are subject to the provisions of the Florida Public Records Law. As such they are subject to public disclosure in accordance with Chapter 119, Florida Statutes.

Background

The Agency is seeking a contractor experienced in small business IT services, recognizing that funds are limited for both monthly support and ongoing hardware replacement. However, the Agency also recognizes the importance of properly securing the Agency's assets and investing in new technology to keep us moving forward effectively. Achieving the right balance of cost and services is crucial.

SECTION 2 STATEMENT OF WORK

A. Infrastructure

Manage and provide technical support services for the Agency's key infrastructure:

1. Enterprise network equipment, including configuration, patch management, monitoring, firewall services, and server monitoring and management.
 - Patch management includes but is not limited to ensuring that patches are installed at a specific interval (monthly, for example), at the best day and time of the week for the Agency, and the provider is aware when patches fail to install properly and engages in manual remediation where needed.
 - Firewall services include but are not limited to troubleshooting and remediation of firewall related services, managing content filtering at the firewall level (whitelisting or blacklisting sites or categories of sites for individuals or groups of users as needed, for example), updating firmware no less often than quarterly (sooner where critical security updates are released), monitoring for uptime, renewing subscriptions, and consulting on periodic refreshing of the firewall hardware.
 - Server monitoring and management includes but is not limited to implementing toolsets for proper alerting on common issues (drive failures; low disk space alerts; resource [CPU, RAM, etc.] overutilization, etc.) and responding to alerts to pre-emptively solve issues before they lead to an outage.
2. Microsoft Active Directory (local Domain Controller), Azure services, and M365 E3 licenses (Cloud-based).
3. Microsoft online Exchange email, individual user email accounts, SPAM filtering, real-time monitoring of suspicious activity, and enforcement of MFA to ensure ongoing security of the Agency's information.
4. Internal (secure) and public WiFi. These systems must be fully segregated to avoid public access to internal devices and files. Provider must have experience implementing and managing VLANs and ACLs to ensure public WiFi does not have access to internal systems.
5. Manage domain registration for the Agency's website (hosting is provided by Achieve). Assess and consult on improvements needed as it relates to ongoing SPF, DMARC and DKIM requirements.
6. Troubleshoot network connections to other IP devices, such as multi-function printers/copiers.
7. Manage anti-virus software.
8. Backup firewall configurations.
9. Record all infrastructure, configuration and software passwords and provide them to the Chief Executive Officer whenever updated.

10. (they can be in the password manager app, but somewhere). In theory passwords should be changed whenever leadership changes. We're required to change passwords every 92 days, so maybe annual for you guys - your call

11.

12. Lawrence

B. Personal Computers and Devices

Manage second level technical support, setup and replacement of personal computers and provide help desk services for all Agency staff. May include limited on-site support, as needed. The Agency employs one (1) full time on-site IT professional at our West Palm Beach location.

- Provide levels of support based on severity of the issue being faced.
- The Agency's business hours are Monday-Friday, 8:00am-5:00pm
- General support issues during business hours should be responded to in a tiered manner:
 - Issues impacting ability to conduct regular business and/or affecting multiple employees should be addressed immediately as an emergency in a timeframe appropriate for the situation (preferred: within 30 minutes).
 - Issues affecting one staff member should be responded to in a defined timeframe (preferred: within 2 hours).
 - Non-urgent matters or requests should be responded to within 2 business days, unless further time is requested.

2. Personal computers primarily consist of laptops. All computers have been upgraded to Windows Pro 11.

- Identify appropriate replacement schedules for existing hardware.
- Identify if costs to set up and configure new/upgraded devices are included in the managed services fee or will be charged separately with each device setup/replacement.

3. Propose, install, maintain, and test anti-virus/malware software for PCs. If the cost of this software is in addition to the monthly user fee, please indicate in your proposal.

4. Manage and support VPN and remote-desktop protocols for secure remote access to devices, including MFA for VPN access.
5. Serve as licensing agent for M365.
6. Serve as the licensing agent for additional 3rd party subscriptions that may not be eligible for direct relationship by the Agency.

C. Disaster Planning and Recovery

Develop and implement disaster recovery (DR) plans:

1. Review existing plan(s) at time of contract award and suggest edits/revisions as appropriate. Review no less often than annually. Review immediately when major technology improvements occur (server refresh, for example) regardless of when the most recent review took place otherwise.
2. Backup all Agency Microsoft 365 data to a separate and independent cloud solution, apart from Microsoft's cloud environment. Microsoft 365 data include all user mailboxes (email), Contacts, Calendar, SharePoint, OneDrive and Teams data located in the Agency Microsoft 365 tenant. Microsoft 365 backups should take place no less often than daily.
3. Provide quarterly trainings for staff on topics of phishing, malware, viruses, social engineering, and other types of risks to the security of our systems.
4. Provide quarterly phish testing simulations. Report on results, including any instances where staff clicked on links or interacted with the phishing simulation environment by, for example, inputting their credentials into the phishing simulation environment.

D. Security

Implement a holistic security posture, to include the following goals:

1. Deploy and enforce ATP scanning at M365 on inbound emails
2. Deploy and enforce link/URL re-write at M365 as a secondary measure of protection against malicious email links being received
3. Critical and high severity patches are to be installed within 30-days of their release across all equipment, preferably sooner once tested and confirmed stable.
4. Deploy and monitor an MDR or XDR to workstations and servers on-premises for security monitoring, alerting and remediation of on-premise security events.
5. Deploy a security monitoring solution for M365, for alerting and remediation of M365 events that are common indicators of compromise.
6. Conduct internal vulnerability scans no less than annually. Provide results as a part of the ongoing review process, to collaboratively address and plan for remediation of concerning findings.
7. Deploy and implement a protective DNS filtering service at the individual system level.
8. Deploy and manage a password manager, that has the capability to report and remediate known cracked passwords on the dark web, and eliminate potential for browser exfiltration of browser-based password managers
9. Monitor the dark web, and alert when user credentials are exposed, to proactively ensure the user credentials are rotated for safekeeping of the potentially breached account
10. Firewall events are monitored by a security operations team.
11. Ensure firewall security implemented adheres to best practices as it relates to current security requirements, including but not limited to Content Filtering, IDS/IPS, and Geo-IP Filtering

E. Other Services

1. Conduct searches of email accounts to comply with public records requests.
2. Ensure files and emails are archived in accordance with state and federal grant agreements.
3. Answer phones live vs. auto-attendants, voicemail, or other non-live solution.
4. Has and produces evidence of adequate errors and omissions, business liability and workers' comp insurance to protect the Agency.
5. Demonstrate capability to respond in person to Agency operational needs in the timelines as defined above.
6. Demonstrate adequate level of staffing to meet the Agency's expectations.

F. Office Relocation

The Agency is relocating their West Palm Beach office with a target occupancy date of June 2026. There are approximately 40 employees who will maintain a work area at this location. Technology to be relocated and setup:

1. Server rack with UPS – electrical outlet may be needed
2. Switches for two suites within the same building
3. 2 domain servers
4. Docking stations
5. Approximately 10 desk Phones

Current User List:

- 60 Full-Time Staff (M365 E3)
- 2 Agency Volunteers (online Exchange only, no M365 license)
- 10 Additional Email Accounts (no M365 license)

SECTION 3 PROPOSAL REQUIREMENTS

Please provide the following information about your firm or team. Proposals should respond to all requirements of this RFP to the maximum extent possible. However, brevity and clarity of Proposals are expected. To assist the selection committee, proposals from Offerors must be submitted in the same sequence shown below.

Tab 1: Introductory Letter

The introductory letter shall name the person or persons authorized to sign contracts and represent the firm or team in any negotiations and provide a very general overview of the firm and the firm's relevant expertise.

Tab 2: Relevant Experience/References

1. This section should provide information regarding the firm's or team's qualifications and experience in relation to the subjects the RFP is intended to cover.
2. Discuss firm's or team's qualifications to perform the work of the size and nature described in this RFP.
3. Discuss experience with similar sized entities.
4. Discuss the firm's or team's familiarity with the Agency.
5. Discuss avoidance of conflict of interest, including any business, familial, or personal connections with Agency or Agency staff.
6. Please provide three references. The references should be current clients.

Tab 3: Approach to Addressing the Opportunity

1. Provide a written work plan outlining in detail how the Offeror proposes to perform the services required. Please respond to each item listed in the project overview/scope, as appropriate.
2. Describe how the Offeror proposes to ensure sufficient staffing is available to serve the Agency 's needs.
3. Provide detail on the Offeror's response timelines for particular issues or needs, such as critical issues, medium priority issues, and low priority issues.
4. Discuss how often the Offeror will be onsite with the Agency /staff.
5. Provide a cost proposal with costs on a fixed-price, per month basis. The monthly cost can be defined on a per user basis or on a per device basis.
6. Please indicate any costs in addition to the base managed services costs (such as, online data storage costs, anti-virus software costs, other potential fees or costs).
7. Identify any other costs that may be charged on an ad-hoc basis and provide hourly rates (such as, setup/replacement of PCs – if charged separately, replacement/reconfiguration of servers, switchers, or firewalls, etc.).
8. The Agency anticipates a 2-year initial term, beginning April 1, 2026, with the option of up to 3 additional one-year extensions.
9. Please describe how you would plan for a smooth transition between the Agency 's current contractor and your firm so that Agency operations can continue in a seamless manner.

Tab 4: Office Relocation

1. Provide a written plan outlining the support the Offeror proposes to perform in the relocation.
2. Describe how the Offeror will evaluate existing wiring at the new location.
3. Identify third party support that may be necessary to support the relocation.
4. Provide a cost proposal to support the relocation.

Tab 5: Price Proposal

Monthly cost
One time relocation cost

SECTION 4: SELECTION PROCESS

Evaluation Criteria

A committee consisting of Agency staff will evaluate all eligible qualifications according to the criteria. The Agency's decisions will be final. This criterion shall be utilized in the evaluation of the proposals. The Agency's evaluation criteria will include, but not be limited to the following:

- Firm Qualifications
- Staff Experience
- Understanding of the Scope of Services
- Price Proposal
- Quality of submittal

After evaluating the Proposals, Agency may engage in individual discussions and interviews with two or more Offerors deemed fully qualified, responsible and suitable based on initial responses, and with professional competence to perform the services required. Repetitive informal interviews are permitted. Proposers shall be encouraged to elaborate on their qualifications, performance data, and staff expertise relevant to the proposed opportunity. At this time, the Agency may request additional information as it relates to cost proposals and monthly fees.

At the conclusion of the informal interviews and based on evaluation factors set forth herein and the information provided and developed in the selection process to this point, the Agency shall rank, in the order of preference, the interviewed proposers whose professional qualifications and proposed intentions are deemed most meritorious.

Negotiations shall then be conducted with top ranked Offeror(s) and if a contract or contracts satisfactory and advantageous to the Offeror can be negotiated at fees considered fair and reasonable, then the Agency Staff shall make a recommendation to the Board of Directors regarding a contract(s) with that Offeror(s). The Agency shall retain final approval of any/all contracts generated as a result, from this RFP.

Pre-Proposal Meeting

A pre-proposal meeting will be held on **Monday, February 2, 2026 at 2:00 p.m.** at 4400 N Congress Avenue, Ste 250, West Palm Beach, FL 33407. This will be the only opportunity for an onsite visit.

Questions/Additional Information

The Agency will not respond to oral inquiries. Interested proposers may contact the Agency regarding questions about the proposal at email: hvath@aaapbtc.org. The Agency will receive written requests for clarification concerning the meaning or interpretation of this RFP until **Friday, February 6, 2026**. All proposers are expected to carefully examine the proposal documents. Any ambiguities or inconsistencies should be brought to the attention of the Agency through written communication with the Agency prior to opening of the proposals.

Respondents may not contact any member of the selection committee, Agency employee or Agency Board member during this solicitation process. All questions or requests for clarification must be routed through the Agency.

Submittal Deadline

Please submit an electronic version of the proposal by email to:

hvath@aaapbtc.org

Cancellation

The Agency reserves the right to cancel this Request for Proposals at any time. The Agency reserves the right to waive minor informalities or discrepancies contained in any Proposal.