Request for Proposal
RFP-GC-120

Information Technology Assessment and Strategic Planning

Phase 1 – Assessment of current technology infrastructure
Assessment and Recommendations re: integration and enhanced workflow across departments and platforms

Phase 4 Technology Strategic Plan

Proposal Submission Dates:

RFP release date – **11/13/2026**
Final date for proposers to submit questions and requests for additional information – **01/15/2027**
Posting of responses to questions – **1/31/2027**
Proposal due – **2/12/2027**
Interviews with finalists – **3/15/2027-3/19/2027**
Contractor selected – **4/15/2027**
Board of Directors approval – **6/07/2027**
Contract start date – **7/01/2027**

Please refer to BidNet Direct for Detailed Submission Instructions on RFP-GC-120

Note: Dates are subject to change at Green Chimneys' sole discretion.

Purpose Summary

Green Chimneys is seeking proposals from qualified vendors to assess the current technology infrastructure, systems, staffing, and platform integrations across the organization to evaluate effectiveness, identify gaps, redundancies, and opportunities for improvement. The assessment should include a review of interdepartmental workflows, data exchange processes, and system interoperability. Based on findings, provide strategic recommendations to optimize integration, streamline operations, enhance collaboration across departments, and improve overall organizational efficiency. Strategic recommendations include both solution architecture and an implementation methodology in the form of a 4-year IT strategic plan.

Organizational Background

Founded in 1947, Green Chimneys' programs celebrate the dignity and worth of all living things. Green Chimneys is a pioneer in animal and nature-based therapy, striving to create a harmonious relationship among children, animals and the environment incorporating an array of educational, residential, recreational, and mental health services. Through innovative therapies and tools to teach critical life skills, we help youth reclaim their childhood, discover their self-worth and create a future for themselves as independent, contributing adults.

Green Chimneys School, a New York State 853 school, serves up to 252 students on two campuses and is designed for students who have been unsuccessful in a traditional educational setting and who require a highly structured and supportive program. The therapeutic program incorporates academic, behavioral and emotional support in a comprehensive learning environment to help each child achieve new skills and confidence, and return to their home school district with the best chance of success.

Our residential treatment is a unique, multi-faceted therapeutic program designed to give every child a chance to succeed academically, socially and emotionally. We provide 24-hour supervision and support to ensure children's safety within a therapeutic milieu that allows each child to participate in an array of beneficial activities as part of their individualized treatment plan. This program provides intensive structure and support to up to 102 emotionally fragile youth ages 6–18 upon admission.

The RTC also operates a Health and Wellness Center that provides 24 hour nursing services to support the health and medical needs of our students and residents.

Our youth are coping with a variety of challenges related to:

- Anxiety Disorders
- Attention Deficit/Hyperactivity Disorder (ADHD)
- Autistic Spectrum Disorders (including Asperger's, High Functioning Autistic (HFA) Disorder, and Pervasive Developmental Disorder)
- Bipolar Disorder
- Impulse Control Disorder
- Mood Disorder

- Post-Traumatic Stress Disorder
- Reactive Attachment Disorder
- School Phobia and Refusal

Green Chimneys community-based programs provide comprehensive prevention/intervention services in mental health and positive youth development to children and teens across Putnam County and bordering areas. Home- and community-based programs provide support to local youth of all ages, including runaway, homeless, street and foster care youth. We seek to empower young people with vital skills and resources to help them enter adulthood as confident, responsible members of their communities.

In addition, our community focused programs provide the community far more than exceptional education and residential life services. The following programs and services reach thousands of children annually:

- Summer Day Camps on two campuses
- Three Season Outdoor Education
- Swim Lessons
- Nature's Nursery Pre-school
- Country Store & Farm Stand

Project Overview

The purpose of this Request for Proposal (RFP) is to invite submissions from qualified and experienced consultant(s) to conduct a two-phase project: an IT Assessment of the current environment and the creation of a 4-year IT Strategic Plan. Green Chimneys may elect to retain the selected consultant(s) for a third phase, Implementation Support, but that decision will be made after the IT Assessment Phase and development of the IT Strategic Plan. The Agency reserves the right to discontinue the consulting engagement following the development of the IT Strategic Plan. Please know consultant(s) may bid on the entire project or may select sections of the project to be bid on.

<u>Information Technology Assessment</u>

In the course of developing and implementing the outcome areas and strategies outlined in Green Chimneys recently adopted strategic plan staff has begun identifying opportunities, needs and specific requirements for information systems and technology. To unearth and delve deeper into staffing needs and organizational opportunities in ways the IT department (ITD) can assist Green Chimneys in accomplishing its operational needs and business requirements, we seek to engage a consultant(s) to drive an internal assessment process with staff. A comprehensive review includes:

- Review and document the existing infrastructure, systems, and technology architecture across several sites – including review of IT department, staffing and function.
- Assess current integrations between platforms, applications, and departments.
- Evaluate business processes and workflows to identify inefficiencies, bottlenecks, and redundancies.

- Efficiency and technology integration across the organization.
- Adequacy of Cyber Insurance Coverage

Currently, ITD primarily fulfills a help desk function and maintains IT equipment and network infrastructure, devices and applications used by educators, students and staff. Green Chimneys would like the consultant(s) to assess and validate the current role of ITD, and the role envisioned as a strategic enabler during implementation of the Green Chimneys strategic plan. The assessment will evaluate current and future infrastructure needs, technology systems, systems maintained by ITD, structure and staffing of ITD, and business processes employed by ITD staff and internal customers of ITD to identify how they currently support ongoing operations and business requirements, how they might better support these requirements now, and how they will support the strategic initiative and business requirements in the future.

IT Strategic Plan

Based upon the results of the assessment, the executive staff and Board IT committee will make decisions on the consultant's preliminary recommendations, including vision and overarching IT strategy for the future, and share those decisions with the Board of Directors. The Green Chimneys' strategic plan will also be considered, and the final product will be a 4-year IT Strategic Plan that will help Green Chimneys achieve its mission, goals and objectives as expressed in the agency's strategic plan.

SCOPE OF WORK

Assessment of ITD Systems, Structures and Processes

The selected consultant(s) will conduct an assessment and provide preliminary recommendations to: address immediate, short- and long-term vulnerabilities and needs. The consultant(s) will then facilitate a process with the executive staff and Board IT Committee to review recommendations and determine the future direction of IT at Green Chimneys.

The selected consultant(s) will conduct an assessment, including but not limited to the following:

- Instructional, administrative, financial and clinical systems
- Technical infrastructure
- Security risks
- Business continuity
- Emergency preparedness
- Ability to adequately recover from a disaster
- Staffing resources, including positions, roles, skills and department structure for ITD required to Support information management, the IT Strategic Plan and Green Chimneys strategic plan
- Current business processes used by staff as they access IT resources and by ITD staff in performing their work
- Gap analysis and opportunities with respect to current and projected technology needs
- Narrative on how technology supports the organizational structure and current and future business requirements
- Potential for IT to be better integrated into programmatic work

- Business and learning requirements of all users, to include all major stakeholder groups such as educators, administration, administrative and clinical departments, students, parents/guardians, referring school districts and community partners
- Current and potential use of technology – including how AI can work to integrate and structure overall workflow and capacity
- Potential database repository
- High-level analysis of enterprise architecture integration opportunities for key applications
- Other concerns or problem areas

Tasks undertaken by the consultant(s) may include but are not limited to the following:

- Interview executive staff, department directors, ITD staff and learning community stakeholders community partners, and Board members
- Compare and provide examples of IT systems, structures, processes and strategies of organizations similar to Green Chimneys and consistent with IT industry best practices
- Provide costs of IT solutions
- Establish schedule to update stakeholders on work progress
- Present findings and recommendations
- Revise findings and recommendations upon gathering feedback

Following the conclusion of the assessment in phase one, Green Chimneys expects, at minimum, the following deliverables:

- Analysis of IT infrastructure and systems, including gaps and vulnerabilities. This will include working with the ITD and executive committee.
- Analysis of the ITD structure and staffing, including gaps and vulnerabilities
- Analysis of ITD business processes and policies, including gaps and vulnerabilities

The report shall include but shall not be limited to:

- SWOT analysis
- Solutions for any identified risks that require immediate, short-term and long-term mitigation, gaps and vulnerabilities
- Opportunities to satisfy unmet administrative, financial, clinical and instructional needs and efficiencies
- Strategies to satisfy unmet business and instructional needs, identified risks, gaps and vulnerabilities
- IT organization, policy, procedure and staffing needs
- Reporting that includes a prioritized set of recommendations for immediate, short- and long-term solutions

Each recommendation shall also include a detailed cost estimate. The consultant(s) will support the Executive Staff in reviewing and validating the consultant's findings. The consultant(s) will facilitate discussions with the executive staff to agree upon key recommendations that will serve as the foundation for the 4-year IT strategic plan.

Following approval of the recommendations by the Agency, the consultant(s) will develop an IT Strategic Plan to implement the recommendations.

4-Year IT Strategic Plan

The purpose of the 4-year IT Strategic Plan is to lay out the path to actualize the IT strategy and vision across the organization and within ITD, based on the recommendations identified in the assessment phase of the project. The consultant(s) is expected to collaborate continuously with agency leadership and staff in the development of the plan. The IT Strategic Plan must support the mission, goals and objectives of Green Chimneys, and the organization's Long Range Strategic Plan. Tasks undertaken by the consultant(s) may include, but are not limited, to the following:

- Incorporate decisions made about vision, strategy and other foundational elements into the IT Strategic Plan
- Incorporate learning and information gathered during the assessment phase
- Identify costs of IT solutions
- Review Green Chimneys' Long Range Strategic Plan to ensure that it is considered and supported by the IT Strategic Plan
- Update organization regularly on work progress
- Present drafts of the IT Strategic Plan to leadership
- Revise and finalize IT Strategic Plan upon gathering feedback

Green Chimneys expects that the 4-year IT Strategic Plan will cover topics such as, but not limited to:

- Enhancements to current systems, interface opportunities and proposed recommendations for new system acquisitions
- IT governance
- IT equipment replacement planning strategies
- IT work flow efficiencies
- IT policies and procedures, including how IT projects and requests that enter the pipeline of IT work
- IT project and activity prioritization and sequencing
- IT structure and staffing appropriate for carrying out the IT Strategic Plan and supporting Green Chimneys in relation to the size of the organization, its priorities and industry best practices
- internal and external resources required for implementation including use of AI.

The IT Strategic Plan shall describe major phases of recommendations, including tasks, short- and long-term milestones, and associated timelines. The IT Strategic Plan shall provide cost estimates for recommended projects and activities, in addition to identifying the staff anticipated to perform under this plan and their anticipated tasks/roles.

<u>Implementation Support</u>

The selected consultant(s) may assist in the implementation of the IT Strategic Plan. This phase is contingent upon the results of the Assessment and IT Strategic Plan development phases, and thus will be developed upon completion of the first two phases of work.

Summary of Desired Qualifications

The ideal proposer will meet the following qualifications:

- Experience with performing similar work described for organizations of analogous size, scope, technology and complexity as Green Chimneys, with the recognition that demonstrated expertise in special education environments is highly desirable

- Knowledge of IT industry best practices
- Adequate staff capacity to effectively complete the project
- Demonstrated experience completing deliverables on budget and on time
- Demonstrated experience in IT strategy development
- Experience with facilitating discussions about IT strategy
- Demonstrated experience in IT assessment efforts
- Experience in identifying vulnerabilities, risks, and solutions for agencies similar to Green Chimneys in size, scope, technology and complexity
- Experience writing and implementing IT strategic plans for agencies similar to Green Chimneys in size, scope and complexity

Terms of Project

A final budget for the IT assessment and development of the IT Strategic Plan will be negotiated once a consultant(s) has been selected. Funds will be paid upon a schedule of deliverables and submission of invoices based on incurred expenses. The decision regarding the necessity for implementation support and attendant costs will be negotiated upon completion and acceptance of the IT Strategic Plan.

Green Chimneys anticipates that the contract will begin **07/01/27**. The selected consultant(s) will enter into a fixed fee deliverables-based contract with a fixed price payment structure. Final amount and length of contract will be negotiated with the selected proposer and may be subject to final approval by the Board of Directors. The selected contractor is responsible for supplying all business equipment and technical capabilities needed to carry out its duties. The duration, extension, renewal, and amendment of the contract may be contingent upon the approval of Green Chimneys' Board of Directors.

Selection process and review criteria

Green Chimneys will review proposals based on completeness and experience of proposers. **Proposals are due 02/12/27** and interviews will be conducted, in person or via Zoom with **finalist proposers on 03/15/27 to 3/19/27.** We anticipate **selection of the consultant(s) to occur on or about** 04/15/27. These dates are subject to change at the Agency's sole discretion. Further written materials may be requested prior to or after the interviews. Green Chimneys reserves the right to schedule additional interviews/meetings should additional questions arise.

Reference checks will be completed, and information obtained through reference checks will complement the results of the proposal review. Green Chimneys must be able to contact a minimum of three references provided by the proposer. If three references cannot be reached, the Agency may deem the proposer ineligible for this opportunity.

Required Documents

Proposers must submit the following required documents, electronically or in hard copy, in order to be eligible for consideration for this RFP.

Proposal - Describe the work plan to accomplish the activities and complete the deliverables within the timeframe proposed. If subcontractors are anticipated, describe what work will be subcontracted, experience with each potential subcontractor, and how the subcontracted work will be controlled and monitored to ensure that project goals are met. The proposal should also enumerate expectations of time commitments from staff members at Green Chimneys.

Team Qualifications and Resumes - Demonstrate staff and team qualifications by providing the following:

- Description of how the organization has adequate staff qualifications to complete the deliverables of this RFP and ensure that project goals are met. Please include information about lead personnel and key supporting personnel.
- List of all staff and subcontractors that will perform work under this RFP and the anticipated tasks/role of each team member.
- Resumes for key personnel and subcontractors performing work for the project. Resumes must clearly explain relevant background and qualifications of key personnel and subcontractors.

Summary of Experience - Describe two relevant work experiences that specifically illustrate how proposer has been successful with previous projects of similar scope and scale.

Cost Proposal - Provide a fixed fee cost proposal for the Assessment phase and a fixed fee cost proposal for the IT Strategic Plan development phase of work. Please do not propose a cost for the Implementation Support phase. Each proposer shall be required to honor the price and specifications quoted for a minimum of sixty calendar days following submission of the proposal. Green Chimneys shall not be liable for any costs incurred in connection with preparation of a proposal in response to this RFP.

References - Provide a list of three current or former references for which the proposer has performed similar work.

Failure to submit all required attachments will constitute an incomplete proposal and may be grounds for disqualification. In order to respond to this RFP, please complete and submit your proposal and all required documents to Green Chimneys no later than 5:00 P.M. EST on **02/12/27**

Appendix

Description of Current Information Technology Infrastructure

Green Chimneys Agency (Multi-Site Network)

Green Chimneys has three locations, with the primary campus in Brewster and the other two sites are Clearpool (Carmel, NY) and Community Based Services (CBS) (Brewster, NY). Each site has its dedicated ISP for internet service. The primary campus has three different internet service providers, and both Clearpool and CBS each have one internet service provider (See **Diagram 1** *Green Chimneys Site's Location below*). Each location may have additional service providers depending on the requirements of each site. Any hardware needed from an external service provider is installed under the supervision of the M.I.S. department at the designated DMARC.

Brewster Campus is the central communication location between the other two sites. Clearpool and CBS have a point-to-point connection going back to campus. The link between the sites is currently a single-mode fiber running at 10Gbps. The point-to-point connection is managed by Cisco layer three switch using EIGRP routing protocol.

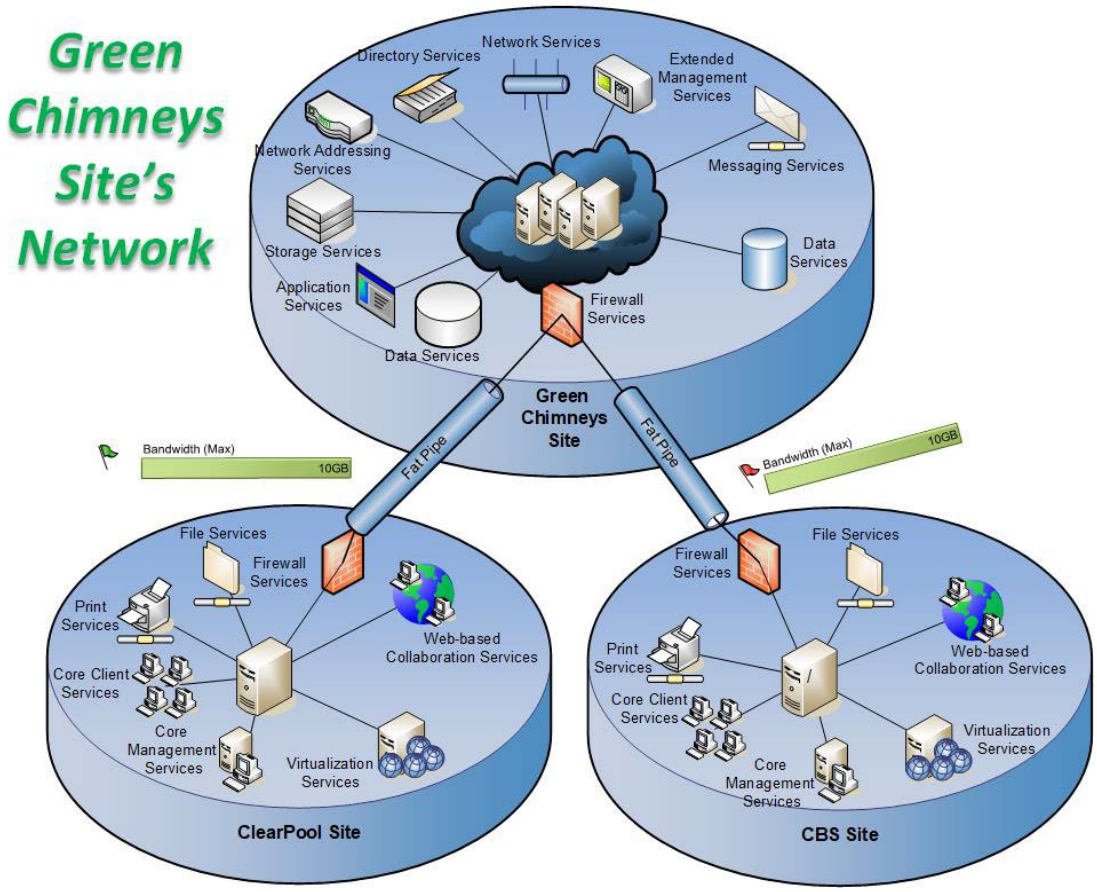
Each site has its dedicated data center, running the site's critical systems. The network traffic on all sites is actively being monitored 24/7 by the Arctic Wolf security team. There is also a SonicWALL firewall inspecting all traffic going in and out of each location. Intrusion Detection System and Intrusion Prevention Systems are actively live through the SonicWALL. Backups of each data center are stored onsite and offsite using Avamar, Synology, Terabyte, and Veeam solutions. Some of the backups are also going into Barracuda cloud and Microsoft azure cloud backup solutions.

Throughout the entire agency, there are security, educational, and application software and tools running. For antivirus, the agency is running Cisco AMPs and Vipre Endpoint solutions. The agency also has Cisco Umbrella for monitoring and managing DNS Traffic. Green Chimneys school system primarily uses PowerSchool, School Messenger, and Google Classrooms. For mail services, Green Chimneys has on premises exchange servers with barracuda email security. For all the email accounts, if any personnel is required to have email outside the campus, they have Login TC setup as a second layer of authentication. For any personnel remoting into green chimneys network, they are going through the Citrix XenApp with a dual authentication.

Green Chimneys network has several different devices that are being used by staff and students. All staff and student computer PCs used on campus are running windows 11. In the educational department, Chromebooks and iPads are beings used for educational purposes. These devices are used during school operational hours and for residential students.

Each location can run other site systems by having the point-to-point link between the sites and with authorization. Green Chimneys Management Information System department controls all wireless systems on the Brewster campus for Clearpool and CBS location. For the wireless access points, Green Chimneys is using Meraki to provide wireless for the entire agency. Telecommunication for all sites is centralized at the Brewster campus. The agency uses a Voice over IP system for all phones and have use CB radios for communication.

Diagram 1. *Green Chimneys Sites Location*



Green Chimneys Campus (Brewster, NY)

Green Chimneys campus hosts all in houses services and application in designated datacenter located on campus. Some of the in-house services are (but not limited to) email, file systems, active directory, network communication, and other services required by department or agency wide. The datacenter is primary composed of Hewlett Packard Enterprise Servers and cisco switches. The datacenter also has a SonicWALL firewall, Arctic Wolf endpoint, and Barracuda mail firewall monitoring all network traffic and emails. All internet services, phone services, and TV services are located is a designated location as DMARC.

Brewster campus have numerous buildings located across campus (See **Diagram 2** Green Chimneys Campus Data Infrastructure and **Diagram 3** Green Chimneys Campus Phone Infrastructure). All of these building are connected using multi-mode fiber or single mode fiber except for one building which is using wireless bridges. The data, phone, and security connections between buildings are designated as a star network connecting back to the datacenter. Each building has a designated utility room where the lines come in for communication. For each of the services (data, phone, security), each have its own dedicated cisco switch, which is also running of APC battery in case of power issues before generator kicks in. The majority of the network cabling for all buildings going to all devices are composed of Cat5e, Cat6, Cat6e cabling, and older building may contain Cat5 cabling.

Diagram 2 *Green Chimneys Campus Data Infrastructure*

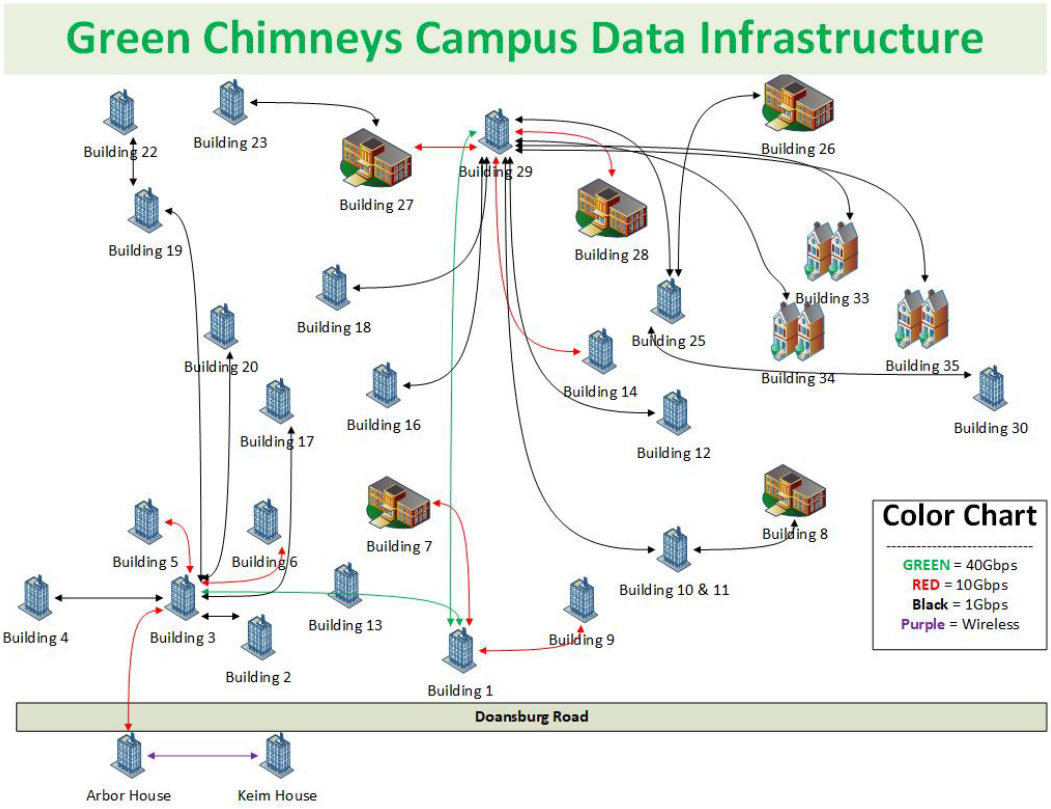
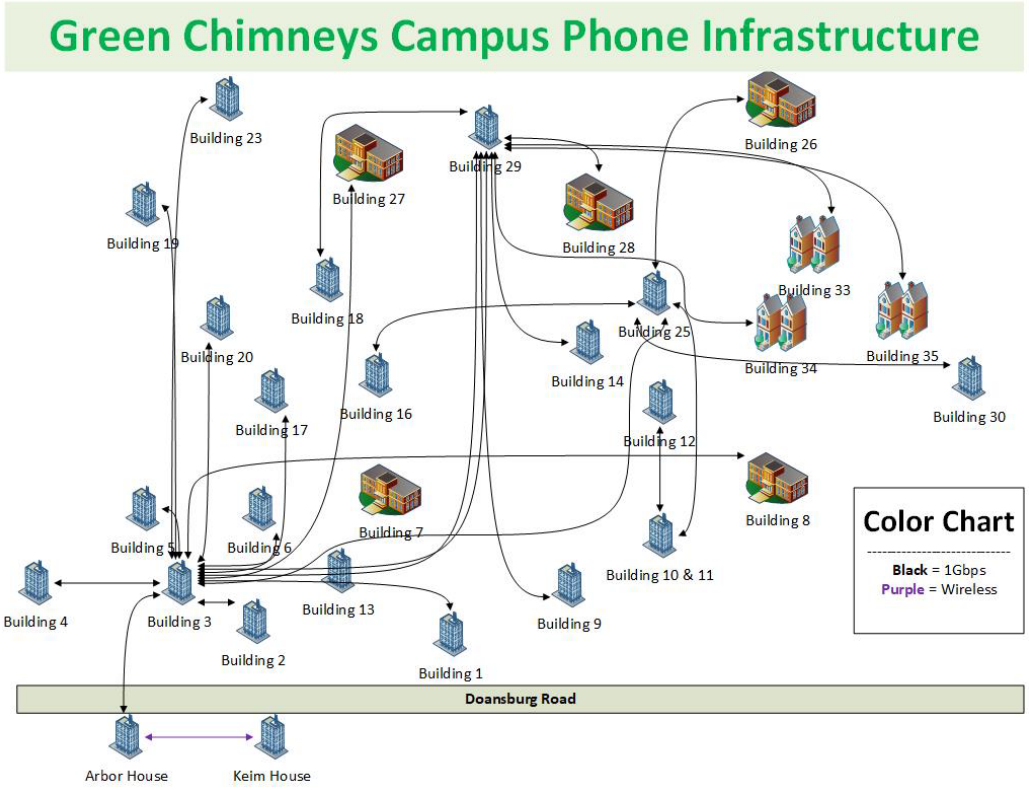


Diagram 3 *Green Chimneys Campus Phone Infrastructure*



Clearpool (Carmel, NY)

Clearpool hosts all in-house services and applications located in their designated data center on-site. Services and applications running are configured to work solely for Clearpool only, or they running are configured to run with other campus sites. The data center is also composed primarily of Hewlett Packard Enterprise Servers and cisco switches. The data center also has a SonicWALL firewall, Arctic Wolf endpoint monitoring traffic coming in and out from Clearpool. Internet lines and any external service provider are coming into the DMARC located in the designated location.

Clearpool campus has several buildings located across the entire location. (See **Diagram 4** Clearpool Data Infrastructure and **Diagram 5** Clearpool Phone Infrastructure). Each of the buildings has single-mode fiber and multimode fiber connected them. Each building has a dedicated utility room where the lines come in and for data communication, phone communication, and security communication. In each of the rooms, cisco switches are used to connect the building together in a star network. All network devices are connected to an APC battery allowing enough time to shut down the system safely. The majority of the networking cabling in all the buildings are composed of Cat5e and Cat6 cables.

Diagram 4 *Green Chimneys Clearpool Data Infrastructure*

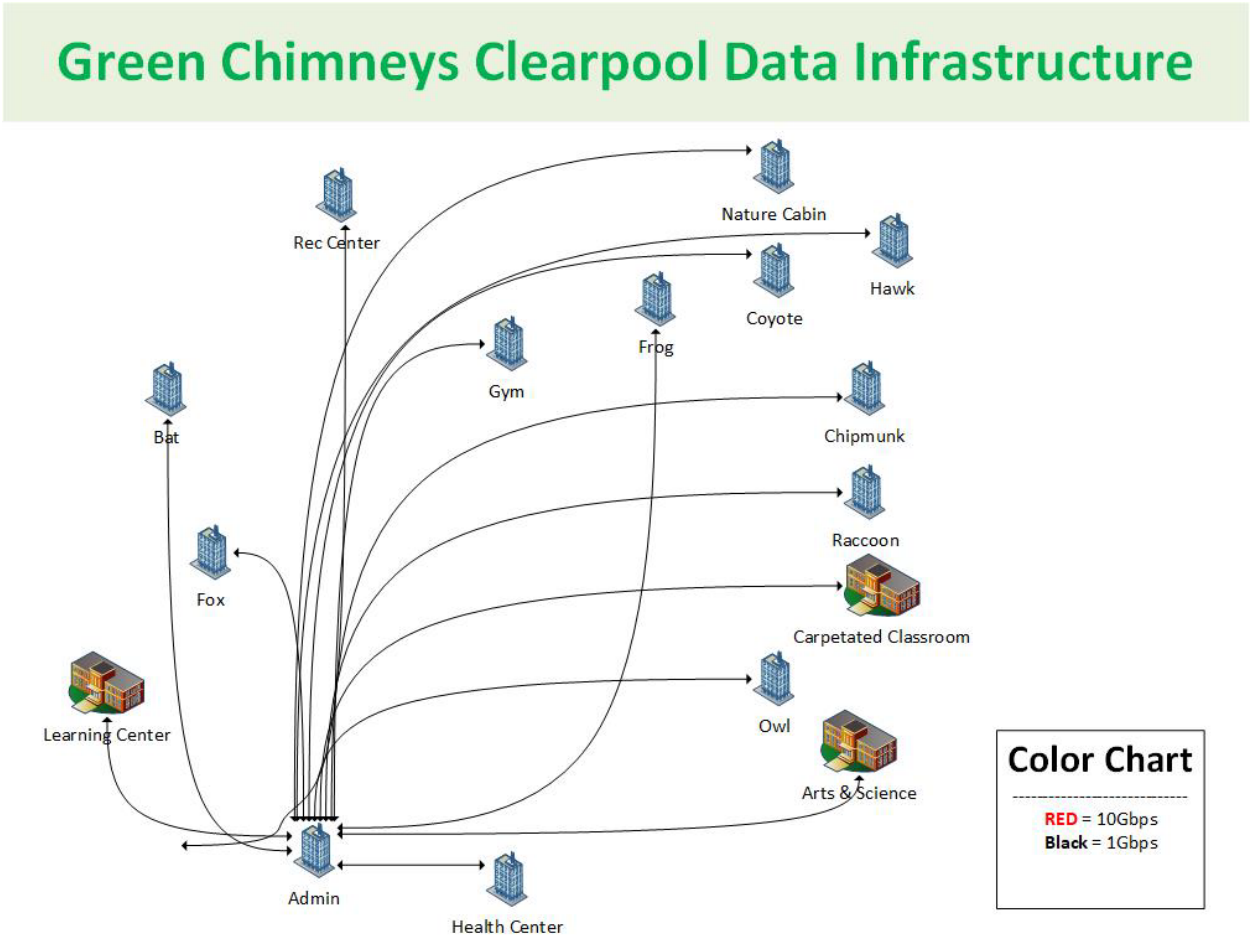
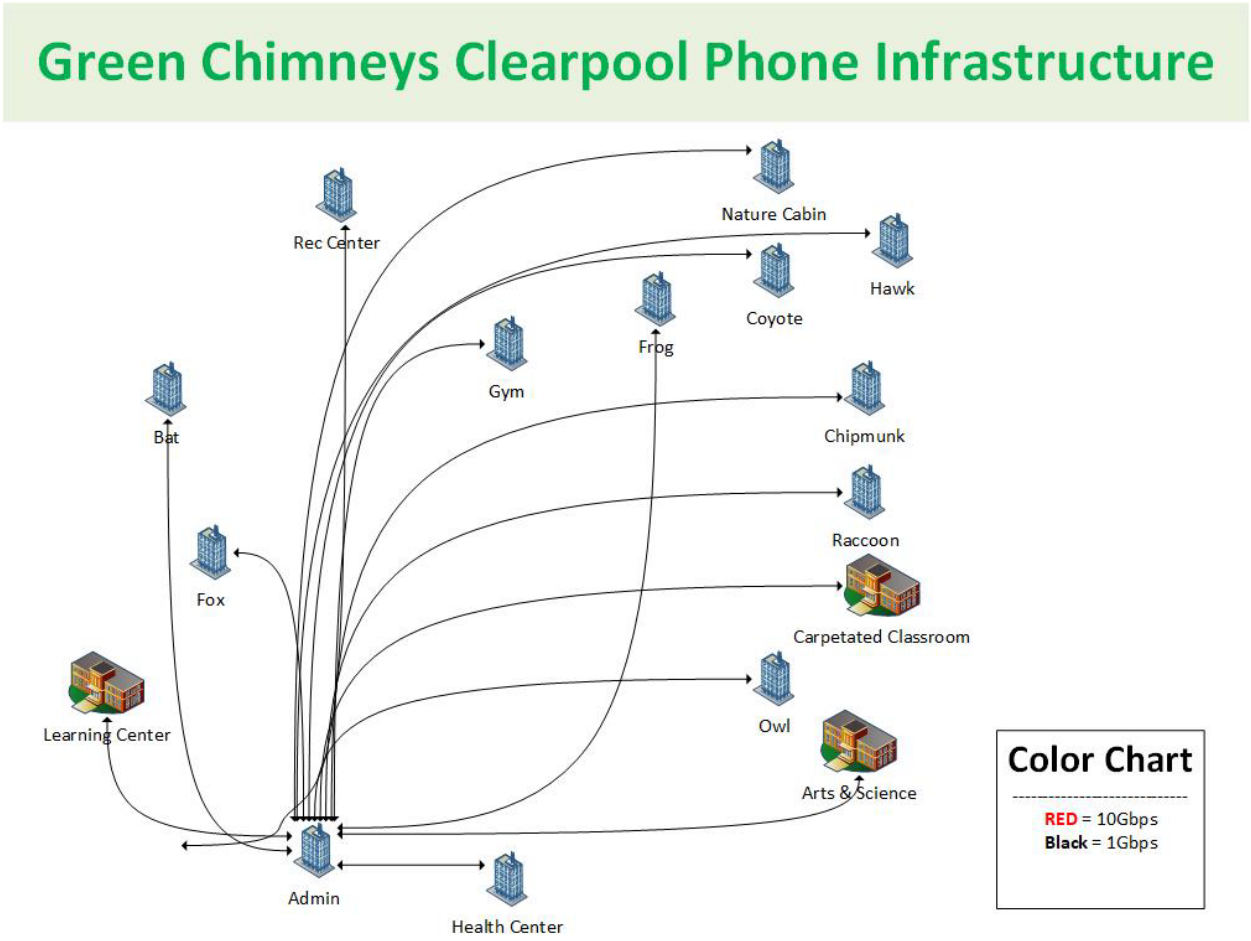


Diagram 5 *Green Chimneys Clearpool Phone Infrastructure*



CBS (Brewster, NY)

CBS hosts all in-house services and applications located in their designated data center on-site. Services and applications running are configured to work solely for Clearpool only, or they running are configured to run with other campus sites. The datacenter is composed of several Hewlett Packard Enterprise Servers and Cisco Switches. All internal wiring in the building is Cat5e landing into the designated datacenter. The Internet Service Provider line is also landing into the datacenter.

Appendix C

System	System Description
HRMS	GREEN CHIMNEYS uses Sage HRMS solution for managing the entire employee life cycle.
Sage HRACTIONS	GREEN CHIMNEYS uses Sage HRACTIONS to provide online forms, covering the entire employment lifecycle.
Cyber Recruiter	GREEN CHIMNEYS uses Sage HRMS Cyber Recruiter for tracking and recruiting software that helps hiring managers, recruiters, and applicants communicate more effectively during the recruiting process.
Sage Fund Accounting, Fixed Assets	GREEN CHIMNEYS uses Sage Fund Accounting as a financial management solution preferred by nonprofit and government organizations for planning and managing budgets, quickly producing accurate reports, maximizing grants, and streamlining human resource Management and reporting.
NetSmart / myEvolve, ePrescribe, RevConnect	Netsmart myEvolv is a web-based, ONC-certified electronic health record (EHR) platform designed specifically for behavioral health, human services, and post-acute care organizations
ExacQ	This is our video management system (VMS) software and servers used for video surveillance throughout the campus.
School Messenger	School Messenger School Notification allows us to reach parents in the way they want to receive messages by sending school notifications via voice, text, email, social media, web, and push notifications.
PowerSchool	PowerSchool is a web based student information system that provides our teachers, students and parents with a tool to communicate student performance. The application helps GC efficiently manage instruction, learning, grading, attendance, assessment, state reporting and special education
IEPDirect	This is the IEP and special education management tool that is shared with our school districts. It provides a consistent IEP format and is easily updated.
Kickboard	Kickboard supports our behavior management system, which is PBIS and assists with data collection and analysis.
Sage Fundraising	Sage Fundraising 50 is a simple and secure payment processing solution for accepting donations and funds from events sponsored by GREEN CHIMNEYS.
Camp Brain	Camp management software for scheduling and other administrative tasks.
Google Classrooms	Tool helping school staff efficiently teach and assess progress, while enhancing connections with learners from school and home.
S2	Provides our ability to monitor the agency via video surveillance and source real-time video data..

Arctic Wolf	It provides managed monitoring and detection 24 hours per day of the GREEN CHIMNEYS networks; thus key in detecting, responding and recovering from cyber threats.
MIP Fund Accounting (Abila)	This is for all general ledger accounting, allocations and cost reporting
TESCO	This is for billing to school districts, counties, aging -built and maintained by outside vendor - custom defined Over the years to accommodate our unique billing situation
Purchase Order (PO) System	Internally created by Jay Singh (Access)
Campbrain	This is used to bill and track receivables for all camps, three seasons, nature nursery and other public programs
ADP Workforce Now /ADP Workforce Manager	This is used to track employee time and attendance, process payroll, payroll reporting
ELAN	Online check processing
Incident Tracker	Incident Tracker is a cloud-based software platform and digital tool used by organizations to log, manage, track, and resolve workplace, safety, operational, or behavioral incidents in real time
OTIS (Online Technology Information and Support)	OTIS online professional development (PD) platform designed to help K-12 teachers and school leaders integrate technology into their classrooms. Created by Teq, it functions as a comprehensive virtual learning hub for instructional staff.
Knowbe4	KnowBe4 is an online platform that combines security awareness training with simulated phishing tests to teach employees how to spot and avoid cyber threats.
BizLibrary	BizLibrary is an all-in-one corporate learning and development (L&D) platform designed to simplify employee training, compliance, onboarding, and upskilling.
SchoolDude	Maintenance Work orders
Key Tracer	Manage vehicle keys
CM3	Building Controls
S2	Door Controls
Visitor Management System	Checks on visitor and issue an ID card
Single Wire Informatcast	Communication software used by GC.

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