

REQUEST FOR PROPOSALS

INFORMATION TECHNOLOGY SUPPORT

PURPOSE

The purpose for this Request for Proposal (RFP) is to evaluate Information Technology Support firms which provide technology solutions, guidance, and support and might be requested to provide the Urban League of Portland with such services.

Vendor(s) selected will be evaluated in part on the ability to deliver necessary services on time and within budget, and their demonstrated understanding of the solution required based on their responses and subsequent interviews.

BACKGROUND

Established in 1945, the Urban League of Portland (ULPDX) is one of the oldest African American service, civil rights, and advocacy organizations in the area. We are part of a network of over 90 National Urban League Affiliates across the country and are recognized as one of the leading voices for African Americans and other people of color in the region. We are a key coalition-builder amongst other African American organizations and work extensively with both traditional and emerging African American groups, the faith-based community, minority businesses, and other organizations of color, including immigrants and refugees. The Urban League of Portland's mission is to empower African Americans and others to achieve equality in education, employment, health, economic security, and quality of life. Our programs include a distinctive blend of direct services, organizing, outreach, and advocacy. We offer workforce services, community health services, summer youth programming, senior services, meaningful civic engagement opportunities, and powerful advocacy.

ULPDX currently does NOT have an IT Department and is using an outside vendor service to provide maintenance and support on as needed basis for its user community.

Presently we have roughly 175 desktops, laptops, and tablets of various manufacturer, aging, specifications, running Windows 10 professional. All staff use Microsoft Office suite and Adobe Acrobat. Our finance team uses a dedicated cloud server for QuickBooks desktop version. Chrome is our preferred browser, and we use Sophos for network protection. Our current laptop of choice is the Microsoft Surface Book, and the Intel NUC is our desktop of choice. Some users work at our location with on-site server, though we have 3 other work sites around Portland, and mostly remote users. We have plans to open an office in Salem, OR this calendar year (2021). We have roughly 85 full time employees. Other detailed information about the specifications is available for review, as necessary.

IDENTIFIED NEEDS

ULPDX is requesting proposals from qualified, professional technology support vendors for Information Technology Support Services. The qualified vendor would provide necessary technical services, which would enable ULPDX to:



- a) Ensure the efficient operation of its data processing networks and related computer systems in its defined user community of roughly 85 users.
- b) Have information systems in place that provide timely, accurate and relevant information, to include data storage and retrieval as well as data entry.
- c) Empower users to make efficient use of technology to improve work quality and increase productivity
- d) Maintain and implement a catastrophic recovery plan to deal with unforeseen events related to information systems. The plan should include accurate equipment lists for insurance purposes and off-site, back-up copies of key data and information.
- e) Protect and secure its technology assets.
- f) Enhance its quality of service to the entire community.
- g) Minimize ongoing technology spending while maximizing the return on investment for technology purchases.
- h) The ideal vendor will resolve computer systems and network issues in accordance with standard and acceptable best practices for maintenance and support. The successful vendor will be expected to organize help desk service calls efficiently and to ensure that there is no significant computer downtime during normal working hours, generally 8:00AM to 6:00PM, Monday through Friday.
- i) The vendor should have significant experience using the Microsoft office array of products especially OneDrive, SharePoint, Teams, and other software that promotes connectivity and collaboration when working remotely.
- j) The vendor is expected to report on status of technology issues and communicate effectively with a designated contract manager at ULPDX. The vendor will guide ULPDX's overall technology planning.

SCOPE OF WORK

This section summarizes the services to be provided to ULPDX in this RFP. ULPDX is looking for a maintenance and support program to be designed under two major categories. These categories are **preventative, planned maintenance and strategic forecasting** alongside ULPDX contract manager and senior leadership, and **as needed/responsive maintenance and help desk**, to accommodate departmental computer system activities and user equipment performance. The RFP is seeking the vendor proposal to define, in detail, the approach to be used in the above categories. Distinction of time and material costs for these efforts, as separate line items, are important to future budget considerations.

- a) Initial Assessment - Review of the inventory, assessment of the system architecture and equipment for efficiency, life expectancy, capacity, speed, and current processes, and make recommendations for improving routine support criteria and eliminating emergency maintenance situations. A report of this initial assessment shall be submitted by within thirty days of contract award and each June 1st if the contract is in place, to allow for planning the next year's budget.
- b) Basic Help Desk / User Support
 - i) deployment of PC's, laptops, smart phones, printers, peripherals, and software, including cloud-based software and computing
 - ii) diagnosis and correction of desktop application problems, including some user end education and training



- iii) identification and correction of user hardware problems, with advanced troubleshooting as needed.
- iv) maintenance of an updated inventory of all related computer related hardware.
- c) **Server and Workstation Administrative Services**
 - i) Management of networks and computer systems, including complex applications, databases, messaging, servers and associated hardware, software, communications, and operating systems, necessary for performance, security, reliability, and recoverability of the systems.
 - ii) Scheduling of preventive maintenance for equipment.
 - iii) Maintenance of records for all help desk tickets for both on- site visits and telephone support.
 - iv) Submission of detailed billing in a timely fashion, payable on a net 30 schedule.
 - v) Development of operations and quality assurance for backup plans and procedures are being followed.
 - vi) Configuration management, including changes, upgrades, patches, etc. is maintained.
 - vii) Management of admin user logins and password security is documented.
- d) **Network Administration Services**
 - i) Maintenance and support of network equipment, including switches, firewalls, routers, and other security and network devices.
 - ii) Installation and maintenance of printers, scanners, network devices et al; analysis, routine configuration changes, and installation of patches and upgrades; minor cabling if needed; alert notifications in case of failure of equipment.
 - iii) Proactive monitoring of network equipment, including performance indicators to report on threshold limitations; network performance and capacity management services; continuous troubleshooting is required.
 - iv) Maintenance of network documentation for daily, weekly, and monthly services is required.
 - v) Submission service reports on a quarterly basis, summarizing service and IT policy issues. The Vendor must be available to meet with the contract manager and/or the President and CEO to review quarterly reports and discuss issues.
- e) **Email, Security and Backup Efforts**
 - i) Maintenance of ULPDX email accounts using ulpdx.org domain; adding, changing, and/or deleting employee accounts as requested; maintenance of virus detection programs on servers and user computers and laptops; performance of periodic security audits, including notification of suspected breaches of security to contract manager.
 - ii) Configuration of systems to enable remote access in a secure environment, with provisions for remote access administration.
 - iii) Development of requirements for a sound data backup policy, with procedures in place to handle daily, weekly, and monthly backup of the computer, data and information, email, and the like; program to restore systems and data if servers and/or computers go down.
- f) **Planning**
 - i) Engineering, planning, and design services for major system enhancements and/or upgrades to existing systems; recommendations for future purchasing and technology needs, when requested or necessary.
 - ii) Installation of new equipment, software, and transfer existing data when acquired.



SUBMISSION REQUIREMENTS

Urban League of Portland is requesting that the proposal submitted address the subjects with specificity. We are looking for a secure, efficient process that enhances rather than hinders our productivity and quality of service, and effective, affordable informational technology systems.

Due to the nature of this proposal, it is requested that each proposal be brief and to the point and consist of no more than eight pages.

Proposals should be emailed no later than 05/15/21 attn: Sebastian Viteri to RFP@ulpdx.org Each proposal shall provide the following information:

Letter of Transmittal - must contain the following statements and information:

- a) Company name, address, telephone number(s), and website.
- b) Name, title, email address, and telephone number of the person(s) to contact and who are authorized to represent the firm and to whom correspondence should be directed.
- c) A brief statement of your understanding of the services to be performed and a positive commitment to provide services as specified.
- d) The letter must be signed by a corporate officer or person authorized to bind the vendor to the proposal and cost schedule.
- e) A statement indicating that the proposal and cost schedule will be valid and binding for ninety (90) days following the proposal due date, and will become part of the contract negotiated with ULPDX
- f) A statement indicating that the contract to be awarded does not obligate the Urban League of Portland to purchase computer equipment, hardware devices, cabling, licenses, software et al from the successful vendor.
- g) The applicant must provide documented proof of ability to obtain professional liability insurance, e.g., copy of insurance finder or letter from carrier promising to provide the required coverage.

Profile - Provide a short profile of the firm including at a minimum:

- a) Diversity of leadership and staff
- b) Length of time in business.
- c) Length of time in providing proposed services.
- d) Number of clients of similar sized organizations.
- e) Number of clients in the nonprofit, human services sector
- f) Location of office to service the account.

Proposal – Must include the scope of work referenced above and a good proposal will include:

- a) Description of the approach the firm will use in providing the services requested. Description of how the vender is positioned to provide the services requested, with a history of experience on providing similar services.



- b) Name, title, address, and telephone number of three references for clients, whom similar services have been provided, including information referencing the actual services performed, number of users, and length of tenure.
- c) Naming of staff resources, with identification of principals and key personnel who are available to provide the services including the experience and expertise of staff, local availability of staff and role and responsibilities that each staff member will have.
- d) Support services questions to be addressed:
 - i. Help Desk Description
 - ii. Support availability (days of week and time)
 - iii. Structure of charges for support
 - iv. Steps for resolving problem escalation
 - v. Final authority regarding conflicts
 - vi. Response time and goal for resolving problems
- e) Explanation of any contract termination for default or other incident in the past five years. Termination for default is defined as notice to stop services for non-performance or poor performance, and issue was either litigated or not litigated. If default occurred, list name, address, and telephone number of the party. If NO such termination occurred for default, declare it.
- f) Scope of services beyond the RFP that the firm provides which may be of interest to the Urban League of Portland.
- g) Proposal summary, including why the firm is pursuing the work and how it is uniquely qualified to perform the services.
- h) Draft Contract Language (The vendor shall submit a draft contract)

Cost of Services

- a) ULPDX is requesting that the vendor submit a fixed rate service contract for a twelve-month period, with an option to renew for a second twelve months. Each twelve-month period must be shown separately. Payment schedule should also be included (ie monthly, quarterly)
- b) Vendors must list, specifically, any services which would not be covered in the proposal price. The vendor shall indicate the impact, if any, of changes in ULPDX IT infrastructure (number of servers, users and/or PC's) on the fixed fee.
- c) Identify the following for those services not under the fixed fee:
 - i. A fee schedule containing the vendor hourly rates
 - ii. A description of how services will be billed
 - iii. A description of additional charges, as in out-of-pocket expenses for travel, subsistence, etc.

EVALUATION CRITERIA

A selection committee, appointed by ULPDX President & CEO will review the vendors' qualifications. From this review, an evaluation and selection process will be completed using the following criteria as a benchmark for making a recommendation:

- A. Experience of the Firm with the Scope
- B. Diversity and Strength in Project Staffing
- C. Satisfaction of Clients/End Users



- D. Quality of support services proposed
- E. Pricing

A rating system, based on pre-defined points and percentages, will be used to evaluate the proposals. The award of the contract will be made to the firm whose proposal receives a favorable evaluation, recommendation of the selection committee, and approval of the President & CEO.

MISCELLANEOUS

ULPDX President & CEO and committee reserve the right to reject any or all proposals for failure to meet the requirements contained herein, to waive any technicalities, and to select the proposal which, in ULPDX's sole judgment, best meet the requirements of the program.

The RFP creates no obligation on the part ULPDX to award a contract or to compensate the Bidder for any costs incurred during proposal presentation, response, submission, presentation, or oral interviews. ULPDX reserves the right to award a contract based on proposals received without further discussion or negotiation. Vendors should not rely upon the opportunity to alter their qualifications during any discussions.

Vendors must specifically identify any portions of their submittals, deemed to contain confidential and proprietary information, or trade secrets. The vendors may be required to justify why ULPDX should not, upon written request, disclose such materials anonymously.

Please Direct Questions via RFP@ulpdx.org with IT RFP in the subject line, no later than 04/27/21. Final proposal due no later than 05/15/21 to the same email address.