



# URBAN LEAGUE OF PORTLAND

10 N Russell Street | Portland, Oregon 97227

## REQUEST FOR PROPOSALS

**Managed IT Services, Information Security & Strategic IT Partnership**

RFP Issue Date:	May 13, 2026
Proposal Due Date:	June 13, 2026
Anticipated Award:	July 11, 2026
Contract Start:	August 1, 2026
RFP Contact:	Director of Operations
Email:	operations@ulpdx.org

*This document contains confidential procurement information. Do not distribute.*



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## 1. Introduction & Organization Overview

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The Urban League of Portland (ULPDX) is a civil rights and social services nonprofit organization headquartered in Portland, Oregon. Founded in 1945, ULPDX serves the African American community and other underserved populations across the Portland metropolitan area through programs in employment, education, economic development, housing, and health equity.

ULPDX operates across multiple program sites throughout the region and employs approximately 140 staff members. Our technology infrastructure supports daily operations across all departments and is critical to the delivery of our mission-aligned services.

ULPDX is issuing this Request for Proposals (RFP) to identify a qualified, experienced Managed IT Services and Information Security partner. The selected vendor will provide comprehensive IT management, cybersecurity, advisory, and policy development services consistent with nonprofit sector best practices, applicable regulatory requirements, and ULPDX's operational scale and budget.

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## 2. Strategic Partnership Vision

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ULPDX is not simply seeking a vendor to maintain existing infrastructure. We are seeking a strategic IT partner — one with experience, capacity, and organizational mindset to grow alongside us.

Our organization is in an active period of programmatic and operational growth. As we expand our service footprint, add staff, and pursue new program funding, our technology needs will evolve accordingly. We require a partner who can anticipate those needs, advise proactively, and build an IT environment that scales efficiently — not one that requires expensive overhauls every time we grow.

The ideal partner will bring the following to our engagement:

### 2.1 IT Strategy & Road mapping

- Ability to develop and maintain a multi-year IT strategic roadmap aligned to ULPDX's organizational goals and growth trajectory
- Proactive identification of technology investments that improve operational efficiency, reduce risk, and support program delivery
- Experience advising nonprofit leadership — including executive directors and board members — on IT priorities and infrastructure investment decisions
- Capacity to translate technical considerations into plain-language guidance that informs organizational decision-making

### 2.2 Scalability & Growth Support

- Demonstrated experience helping nonprofit organizations scale their IT infrastructure as headcount, sites, and program complexity increase



- Flexible service models that can expand or contract based on ULPDX's needs without requiring full contract renegotiation
- Ability to onboard new staff, activate new sites, and integrate new tools rapidly and with minimal disruption to existing operations
- Experience supporting organizations through facility moves, new site buildouts, or technology refresh cycles
- Familiarity with grant-funded technology projects, including documentation requirements and compliance considerations common in the nonprofit sector

### 2.3 Long-Term Partnership Orientation

- A proactive, consultative service model — not just reactive break/fix support
- Quarterly business reviews that include technology health reporting, forward-looking recommendations, and budget planning input
- A named account manager or strategic point of contact who understands ULPDX's environment and mission
- Track record of long-term client relationships with nonprofits of comparable complexity

Vendors are strongly encouraged to describe their approach to strategic IT partnership in their proposals, including specific examples of how they have helped similar organizations plan for and manage growth.

## 3. Current Technology Environment

The following reflects ULPDX's existing IT environment. Prospective vendors should use this as the basis for scoping their proposals.

### 3.1 Organizational Scale

Category	Detail
Total Staff (Covered Users)	Approximately 140 employees
Managed Devices (Endpoints)	Approximately 195
Physical Locations (Active)	8 sites (Russell/HQ, SR Center, Fox Tower, Fairfield, Heritage, Tigard, Williams, Hattie Redmond)
Servers (Physical/Virtual)	6 (including Util01, DC01, Aurora, and 3 ADFS servers)
Microsoft 365 Licenses	Approximately 140 (mix of Apps for Enterprise, E3, E5, Business Basic)
Primary Collaboration Platform	Microsoft 365 / Teams / SharePoint / OneDrive



## **3.2 Current IT Services Footprint**

ULPDX currently receives managed IT support, cybersecurity services, backup and disaster recovery, virtual CISO advisory, and Microsoft 365 cloud administration through a single incumbent provider. These service categories form the baseline scope for this RFP and are detailed in Section 4

Vendors should note that ULPDX's current technology footprint spans a broad, multi-platform environment covering productivity, communications, project management, security, and program operations tools across all eight active sites. Prior to contract execution, ULPDX will provide the selected vendor with a complete inventory of systems in scope.

## **4. Scope of Services Required**

Proposals must address all of the following service areas. Vendors may propose modular pricing by service category to support evaluation flexibility. Subcontracting arrangements must be clearly disclosed.

### **4.1 Managed IT Services (MSP)**

- Per-user managed helpdesk and technical support for all staff, with defined SLA tiers for Priority 1, 2, and 3 incidents
- On-site and remote support capabilities
- Server management, monitoring, and maintenance for physical and virtual infrastructure
- Multi-site network management, monitoring, and firewall administration
- Endpoint management — device provisioning, patching, remote management, and decommissioning
- IT asset lifecycle management and reporting
- Strategic IT management, planning, and quarterly business reviews

### **4.2 Cybersecurity Services**

- Comprehensive endpoint protection: AV, EDR, MDR, ransomware detection, and endpoint backup
- Email security and filtering with threat intelligence integration
- Multi-factor authentication (MFA) — vendors should address integration with Microsoft 365 and Entra ID
- Perimeter firewall management and monitoring at all active sites
- Dark web monitoring for organizational domain and credentials
- Security awareness training platform with reporting on staff completion rates
- Annual (at minimum) internal and external penetration testing with executive and technical reporting
- Incident response support and tabletop exercise facilitation



### **4.3 Backup & Business Continuity**

- Microsoft 365 backup covering Exchange Online, OneDrive, and SharePoint
- On-premises BCDR solution with local and cloud retention for server workloads
- Documented recovery time objective (RTO) and recovery point objective (RPO) targets
- Annual DR testing and reporting

### **4.4 Virtual CISO (vCISO) Services**

- Fractional vCISO engagement: Vendors should propose the minimum monthly hour commitment they recommend for an organization of ULPDX's size and complexity, and explain the rationale.
- Review, update as needed, and maintain ULPDX's Information Security Program and policy framework
- Risk assessments, gap analysis, and remediation roadmap development
- Compliance oversight and guidance (e.g., HIPAA-adjacent program data, PCI if applicable, state requirements)
- Board and leadership-level security reporting
- Vendor security assessments and third-party risk reviews

### **4.5 Microsoft 365 & Cloud Administration**

- Microsoft 365 tenant administration, licensing optimization, and lifecycle management
- Entra ID / Azure AD management, conditional access policies, and identity governance
- Teams, SharePoint, and OneDrive governance and support
- Exchange Online and email archiving management
- Microsoft Secure Score monitoring and improvement

### **4.6 IT Strategy & Growth Advisory**

- Development of a multi-year IT strategic roadmap updated annually, aligned to ULPDX's organizational growth and program priorities
- Annual technology assessment covering infrastructure, security posture, licensing efficiency, and vendor landscape
- Budget planning support, including capital and operational IT forecasting
- Advisory support for new site activations, facility transitions, and technology refresh cycles
- Regular briefings to ULPDX leadership on technology trends, risk landscape, and strategic recommendations

### **4.7 Systems Administration & Employee Onboarding/Offboarding**

Vendors must include in their proposal a recommended approach for how systems administration and the full employee onboarding and offboarding IT lifecycle would be structured and managed for an organization of ULPDX's size and complexity. At minimum, the proposed approach must address:



- Account, license, and access provisioning across the full ULPDX platform environment
- Device setup, recovery, and lifecycle management
- Turnaround time commitments for new hire provisioning and for both standard and urgent/involuntary offboarding
- Development and maintenance of standardized onboarding and offboarding process documentation and checklists for use by ULPDX staff
- Role-based access standards, ongoing access governance, and periodic access auditing
- Participation in new hire orientations to deliver IT onboarding training covering device setup, Microsoft 365 use in alignment with organizational standards, security basics, and required policy acknowledgments

Prior to contract execution, ULPDX will provide the selected vendor with a complete inventory of systems in scope.

#### **4.8 IT Policy & Process Development**

ULPDX requires its IT partner to play an active role in developing, documenting, and maintaining the policies, procedures, and standard operating processes that govern how technology is used, managed, and protected across the organization. The vendor is expected to bring expertise and initiative to this work — identifying gaps and recommending a path to resolution.

Policies must be written in plain language, tailored to ULPDX's environment and operations, accessible to non-technical staff, reviewed and approved by ULPDX leadership prior to implementation, stored in a location accessible to relevant staff, and subject to version control.

#### **IT Security & Acceptable Use Policies:**

- Acceptable Use Policy (AUP) governing staff use of ULPDX-owned devices, networks, software, and data
- IT Security Policy covering data classification, access controls, password and credential standards, remote work security requirements, and device handling
- Incident Response Policy defining how security events are identified, reported, escalated, and resolved — including roles, timelines, and communication protocols
- Data Retention and Destruction Policy governing how organizational data is stored, backed up, archived, and securely disposed of
- Remote Access and Mobile Device Policy covering VPN use, personal device (BYOD) guidelines, and mobile device management requirements
- Email and Communications Security Policy addressing phishing awareness, acceptable use of organizational email, and handling of sensitive information
- Annual review and update of all security policies to reflect changes in the threat landscape, ULPDX's operations, or applicable regulatory requirements

#### **Onboarding & Offboarding SOPs and Workflows:**



- Documented IT Onboarding SOP covering the full provisioning workflow from HR intake through day-one readiness, including step-by-step tasks, responsible parties, timelines, and escalation paths
- Documented IT Offboarding SOP covering the full deprovisioning workflow for both voluntary and involuntary separations, including access revocation sequencing, device recovery, and documentation requirements
- Intake forms or ticketing workflows that HR and Operations can use to initiate onboarding and offboarding requests without IT expertise
- Role-based access matrices defining standard provisioning profiles by job type, department, or access tier
- Periodic review of onboarding and offboarding procedures to incorporate new platforms, revised role structures, or lessons learned

#### **Vendor & Procurement-Related IT Policies:**

- Vendor Security Assessment Framework — a structured process for evaluating the security posture of new and existing technology vendors before contract execution or renewal
- Third-Party Access Policy governing how and under what conditions external vendors, contractors, or partners are granted access to ULPDX systems, data, or networks
- Software and SaaS Procurement Policy establishing guidelines for evaluating, approving, and onboarding new technology tools — including security review requirements and integration considerations
- IT Vendor Management Standards defining expectations for vendor performance, contract documentation, license tracking, and renewal oversight in coordination with ULPDX Operations
- Data Processing and Subprocessor Guidelines outlining requirements for vendors who handle ULPDX data, including data handling standards, breach notification expectations, and contractual minimums

#### **Additional Process Documentation:**

- IT Change Management Process — a practical framework for managing significant changes to ULPDX's infrastructure, software, or configurations with appropriate testing, approval, and rollback procedures
- IT Asset Management Process — standards for tracking, maintaining, and retiring hardware and software assets across all sites
- Help Desk and Escalation Procedures — staff-facing guidance on how to submit IT requests, what to expect, and how urgent issues are escalated
- Business Continuity and Disaster Recovery Procedures — operational runbooks for restoring critical systems and services following an outage or incident, aligned to ULPDX's documented RTO and RPO targets

The vendor is responsible for proactively scheduling policy reviews and flagging when updates are needed — ULPDX should not have to prompt this work.

## **5. Proposal Requirements**



All proposals must include the following components. Incomplete submissions will not be evaluated.

### **5.1 Organizational Qualifications**

- Company overview: years in operation, size, nonprofit/public sector experience
- Description of nonprofit client base and any sector-specific expertise
- List of at least three (3) current nonprofit clients of similar scale (100–250 users, multi-site) with references
- Staffing model: dedicated vs. shared personnel, escalation paths, and key team bios
- Relevant certifications (e.g., SOC 2 Type II, ISO 27001, CompTIA MSP Verify, Microsoft Partner designation)
- Disclosure of any subcontracted services and named subcontractors

### **5.2 Strategic Partnership Approach**

- Description of the vendor's approach to IT strategy and long-term client partnership — not just service delivery
- Examples of how the vendor has supported a comparable nonprofit through a period of organizational growth or expansion
- How the vendor structures strategic advisory services (QBRs, road mapping sessions, leadership briefings)
- How the vendor stays current on nonprofit-specific technology trends, funding landscape, and compliance requirements
- Named account manager or strategic point of contact model
- Demonstrated approach to managing client services and special projects, including communication, accountability, and delivery

### **5.3 Systems Administration & Onboarding/Offboarding Approach**

Vendors must provide a detailed description of how they will fulfill the requirements outlined in Section 4.7. This response must include:

- The proposed intake process for submitting and tracking onboarding and offboarding requests
- Defined turnaround time commitments for new hire provisioning and for access revocation under both standard and urgent/involuntary offboarding scenarios
- How the vendor manages administration across a broad, multi-platform environment and approaches onboarding new platforms mid-contract
- How completed provisioning and deprovisioning actions are documented and reported to ULPDX
- The vendor's approach to periodic access audits and ongoing access hygiene
- Any tooling, automation, or workflow systems used to manage the process
- Sample onboarding and offboarding checklists, if available



### 5.4 IT Policy & Process Development Approach

Vendors must describe their approach to IT policy and process development, including:

- How the vendor assesses a client's current policy landscape and identifies gaps
- Examples of IT policies and SOPs developed for comparable nonprofit clients — sample documents or excerpts are encouraged
- The vendor's process for drafting, reviewing, and gaining client approval on policy documents
- How the vendor ensures policies remain current and schedules periodic reviews without requiring the client to prompt that work
- Staffing model for policy development — who leads this work and how it relates to the vCISO function
- Estimated timeline for developing a foundational policy library for an organization of ULPDX's size and complexity

### 5.5 Service Delivery Model

- Detailed description of helpdesk staffing, hours of coverage, and after-hours/on-call procedures
- Transition plan from an incumbent provider, including knowledge transfer approach
- Ticketing system and client portal overview
- Communication and escalation protocols
- Reporting cadence and format (monthly, quarterly, annual)

### 5.6 Service Level Agreements

Priority Level	Definition	Proposed Response Time	Proposed Resolution Target
P1 — Critical	System outage, security incident, or full-staff impact	_____	_____
P2 — High	Significant degradation or single-department impact	_____	_____
P3 — Medium	Individual user issue, non-urgent request	_____	_____
P4 — Low	Scheduled work, how-to, or minor request	_____	_____
Onboarding Completion	All access and devices ready for new hire first day	_____	_____
Offboarding — Standard	Full access revocation, voluntary separation	_____	_____
Offboarding — Urgent	Full access revocation, involuntary separation	_____	_____



Priority Level	Definition	Proposed Response Time	Proposed Resolution Target
Policy Deliverable	Draft policy or SOP submitted for ULPDX review	_____	_____

Vendors should include proposed SLA remedies or penalties for missed response targets.

### 5.7 Pricing

Please provide fully itemized pricing using the structure below. All pricing should be monthly and annualized. Identify which line items are fixed vs. variable, and note any volume discount thresholds.

Service Category	Unit / Basis	Monthly Price	Annual Price	Notes
Per-User Managed IT Support	Per user (140 est.)			
Server Management	Per server (6)			
Site Network Monitoring & Support	Per site (8 active)			
IT Management & Direction	Flat monthly			
Comprehensive Endpoint Protection	Per device (195 est.)			
Email Security & Filtering	Per mailbox			
Firewall Management (per site)	Per site			
MFA Management	Per user or flat			
Dark Web Monitoring	Flat monthly			
Security Awareness Training	Per user or flat			
Penetration Testing (Int/Ext)	Annual or monthly			
M365 / O365 SaaS Backup	Per mailbox/seat			
BCDR / On-Prem Backup	Flat monthly			
vCISO Services	Hourly or flat			
vCISO Remediation & Planning	Flat monthly			
M365 Admin & Cloud Management	Flat or per-user			



Service Category	Unit / Basis	Monthly Price	Annual Price	Notes
IT Strategy & Road mapping	Flat monthly or annual			
Systems Administration — All Platforms	Flat monthly			
Employee Onboarding (IT tasks)	Per event or included			
Employee Offboarding (IT tasks)	Per event or included			
IT Policy & Process Development	Flat monthly, project-based, or included			
TOTAL MONTHLY ESTIMATE				

### 5.8 Term & Contract Structure

- Proposed contract term(s) and any multi-year pricing incentives
- Termination for convenience provisions and notice requirements
- Provisions for scaling up or down based on headcount or site changes
- Data portability and offboarding assistance commitments
- Invoicing structure, including billing frequency, payment terms, and itemization for budget tracking and audit needs

## 6. Evaluation Criteria

Proposals will be evaluated by an internal review committee using the following weighted criteria:

Evaluation Category	Weight	Description
Technical Qualifications & Certifications	10%	Vendor credentials, staff expertise, toolset maturity, and security certifications
Nonprofit & Comparable Client Experience	10%	Demonstrated experience with nonprofits of similar size, sector knowledge, and mission alignment
Strategic Partnership & Growth Advisory Capability	15%	Quality of IT strategy approach, road mapping methodology, and demonstrated ability to support organizational scaling
Systems Administration & Onboarding/Offboarding Process	15%	Clarity, completeness, and rigor of the proposed employee lifecycle management process — including intake workflow, turnaround commitments, and cross-platform access management



Evaluation Category	Weight	Description
IT Policy & Process Development Capability	15%	Quality and depth of the vendor's approach to policy development, sample work product, and ability to build and maintain a foundational policy library with minimal client burden
Service Delivery Model & SLAs	10%	Helpdesk coverage, escalation protocols, transition plan, and accountability mechanisms
Pricing & Value	20%	Competitiveness of pricing relative to scope, transparency of pricing model, and demonstrated cost efficiency
vCISO & Security Program Depth	5%	Quality and specificity of the InfoSec advisory approach and compliance experience

ULPDX reserves the right to conduct vendor interviews, request oral presentations, negotiate with one or more finalists, and award to the vendor determined to be in the best interest of the organization.

## 7. Submission Instructions

### 7.1 Deadline & Format

- Proposals must be submitted electronically as a single PDF no later than 5:00 PM Pacific Time on June 13, 2026.
- Email to: [operations@ulpdx.org](mailto:operations@ulpdx.org) with subject line: "IT Services RFP — [Company Name]"
- Late submissions will not be accepted.

### 7.2 Questions & Clarifications

- All questions must be submitted in writing to [operations@ulpdx.org](mailto:operations@ulpdx.org) by May 30, 2026.
- Q&A responses will be distributed to all registered respondents by June 6, 2026.
- No verbal inquiries will be addressed or considered binding.

### 7.3 Proposal Validity

Proposals must remain valid for a minimum of 90 days from the submission deadline.

## 8. Procurement Timeline

Milestone	Date
RFP Issued	May 13, 2026



Milestone	Date
Deadline for Vendor Questions	May 30, 2026
Q&A Response Issued to All Respondents	June 6, 2026
Proposals Due	June 13, 2026   5:00 PM PT
Internal Review & Scoring Complete	June 20, 2026
Finalist Interviews (if applicable)	June 23–27, 2026
Anticipated Award Notification	July 11, 2026
Contract Execution Target	July 18, 2026
Service Commencement	August 1, 2026

## 9. Terms & Conditions

- ULPDX reserves the right to reject any and all proposals, to waive informalities, and to accept the proposal deemed most advantageous to the organization.
- ULPDX is not liable for any costs incurred by vendors in preparing or submitting proposals.
- All proposals and submitted materials become the property of ULPDX.
- ULPDX is a tax-exempt 501(c)(3) nonprofit organization. No sales tax applies.
- The selected vendor will be required to maintain appropriate general liability, professional liability (E&O), and cyber liability insurance at levels specified in the final contract.
- ULPDX is an equal opportunity employer and requires its vendors to comply with all applicable federal, state, and local non-discrimination laws.
- Any agreement resulting from this RFP is subject to board approval if above the threshold established in ULPDX's procurement policy.

## Appendix A: Vendor Attestation

By submitting a proposal, the vendor attests that:

- All information provided is accurate and complete to the best of the vendor's knowledge
- The vendor is legally authorized to do business in the State of Oregon
- The vendor does not have a current, unresolved conflict of interest with the Urban League of Portland
- The vendor will maintain all required insurance coverage for the duration of any resulting contract
- The vendor agrees to the terms and conditions set forth in this RFP



Company Legal Name:	_____
Authorized Signatory Name:	_____
Title:	_____
Signature:	_____
Date:	_____
Address:	_____
Phone:	_____
Email:	_____

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*Thank you for your interest in partnering with the Urban League of Portland.  
Together, we advance equity, opportunity, and community well-being.*