



**REQUEST FOR PROPOSALS
INFORMATION TECHNOLOGY SUPPORT SERVICES**

for

Waymakers

RETURN PROPOSAL TO:

rfp@waymakersoc.org

Waymakers
440 Exchange, suite 250
Irvine, CA 92807
ATTN: IT Support Services RFP

DEADLINE FOR PROPOSAL SUBMITTAL:

5:00 p.m., June 29, 2026

**Waymakers
Request for Proposal
Information Technology Support Services**

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INTRODUCTION

Waymakers is seeking proposals from qualified, knowledgeable, and experienced companies to provide Information Technology (IT) Services to meet the agency's IT hardware and software needs. Waymakers anticipates contracting with a single organization for a period of 3 years, with the option of extending for two (2) additional one-year terms.

This request for proposal (RFP) contains background information on Waymakers and specific information that must be included in the proposals submitted. An electronic version of the proposal must be received no later than **Friday, June 29th 2026 on or before 5:00 p.m. PT.** Any submissions received after this date will not be considered as valid unless acts of nature prohibit the bidder from meeting the deadline. Electronic copies must be delivered via email to rfp@WaymakersOC.org. If necessary, physical copies may be delivered directly to our office at the following address:

Waymakers

440 Exchange, Ste. 250

Irvine, CA 92602

Attn: IT Support Services RFP

Format: all responses to this RFP should be:

- In pdf format
- Limited to 15 pages (excluding attachments and the Executive Summary)
- Typed on 8.5 X 11-inch paper utilizing the Times Roman 12-point font
- Each page must be clearly numbered and reference the respondent's name

Responses to the RFP will be accepted from all qualified contractors who are able to meet the required specification set forth in the RFP.

RFP Inquiries

RFP@WaymakersOC.org shall be the sole medium of contact from the date of release of this RFP until the announcement of its award. All questions and/or issues should be submitted in writing by email to rfp@WaymakersOC.org and must have Waymakers IT RFP in the subject line. Any oral communications with Waymakers will be considered unofficial and nonbinding. Vendors should rely only on written statements and electronic communications issued from rfp@WaymakersOC.org.

This document contains proprietary and confidential information pertaining to Waymakers. The information contained in this document may not be published, disclosed or used for any purpose other than to prepare the response to this Request for Proposal (RFP), without the prior written consent of Waymakers.

AGENCY OVERVIEW

Waymakers is an Orange County nonprofit organization committed to helping individuals who are experiencing conflict and crisis make their way to a place of strength and stability. Waymakers was established in 1972 at the University of California, Irvine and has since grown significantly in size and scope of program services. Specifically, Waymakers programs include:

Sheltering Children ages 11-17 who are homeless, runaway, abused, or those struggling with mental health issues. Waymakers Youth Shelter Program offers a short-term crisis intervention residential program with the goal of family reunification. Children are given emergency shelter (up to 21 days), regular meals, 24-hour supervision, individual, group and family counseling, academic tutoring, safety education, life skills development activities, and aftercare services.

Supporting Victims of crime and surviving family members as they learn to cope with the aftermath of crime. Waymakers Victim Assistance Programs provide comprehensive services for individuals who are victims of any types of crime. Waymakers advocates for victims' rights, provides emergency assistance in the aftermath of crime, provides on-going support to alleviate the trauma, and eases the process of participation in the criminal justice system.

Counseling Families and youth by providing early intervention and needed support services. Waymakers Youth Development Programs work with juveniles who have come to the attention of law enforcement, children whose behaviors or mental health concerns impact stability in their homes or create high risk for gang involvement, or youth who have complex needs based on mental health concerns and involvement with the criminal justice system.

Resolving Conflicts by providing trained mediators to help individuals experience conflict find ways to communicate their concerns and arrive at resolution. Waymakers Dispute Resolution Services' trained volunteer and staff mediators guide disputants through a best practice model of conflict resolution in order to find an agreement that works for individuals on both sides of the conflict.

Educating Communities through sexual assault, human trafficking, family violence, and alcohol, tobacco, and other drug prevention and education programs that provide members of the Orange County community information needed to lead healthier and safer lives. Waymakers provides education, technical assistance, and media campaigns through a diverse network of community partners.

Waymakers staff members are located in sites throughout Orange County. The agency has just over 250 employees and utilizes more than 1,500 volunteers each year. Revenue for fiscal year 2024-2025 was just over \$31M. The agency serves more than 30,000` individuals each year.

Waymakers' annual revenue is primarily obtained through grant funding from federal and state government grants and contracts. As the recipient of federal funds Waymakers is obligated to ensure that all funds are used prudently in support of its mission and in full compliance with federal grant management requirements. Waymakers satisfies this responsibility by periodically reviewing services received from all vendors and seeking competitive proposals to maintain compliance with federal wards procurement requirements. **CURRENT TECHNICAL ENVIRONMENT**

The follow provides an overview of current assets and locations:

Program/Location	Work Stations	Servers	Switches	Firewalls
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Waymakers Corporate 440 Exchange, suite 250, Irvine	80	5	10	1
Project PATH 440 Exchange suite 250, Irvine	13	1	1	0
Victim Assistance Programs 440 Exchange suite 250, Irvine	66	0	1	0
Lamoreaux Justice Center 341 The City Drive, Ste. 408, Orange	21	0	0	0
North Justice Center 1275 N. Berkeley Ave, Stes. 490, 488, 485, Fullerton	10	0	1	1
Central Justice Center 700 Civic Center Drive West, Ste. 292, 292B, Santa Ana	9	0	0	0
Harbor Justice Center 4601 Jamboree Rd., Ste. 103, Newport Beach	8	0	1	1
West Justice Center 8141 13 th Street, 1 st Floor, Westminster	9	0	1	1
Youth Shelter 7291 Talbert Ave, Huntington Beach	23	1	1	1
Youth Shelter 14632 Yorba Street, Tustin	19	1	1	1
Youth Shelter 17332 Amaganset Way, Tustin	22	1	1	1
TOTAL	280	9	18	7

Many administrative, direct service, and training & outreach staff members work in the field and have laptop computers, which also require maintenance. Many of these computers must be encrypted in accordance with HIPPA guidelines to protect client confidentiality.

Waymakers has staff embedded in partner organizations such as the Orange County Superior Court, the Orange County District Attorney’s Office, and several local law enforcement agencies. The computers in these locations are the property of the partner agency, but at times Waymakers’ IT provider is required to work on those computers in coordination with the partner agency.

Waymakers has recently moved to a new payroll/HRIS system (UKG) and a new accounting system – (Sage). The goal is to have virtually paperless systems. The agency is still transitioning to some of the modules included with the transition.

Waymakers uses specialized software supporting individual programs and agency overall that include the following Electronic Health Record systems including: Exym, IRIS, UKG, Accufund, and Sage. It is also anticipated the selected IT vendor will need to work with communication and printer vendors such as, but not limited to, Konica, C3, VoIP PBX phone system, and our security company SCN

SCOPE OF SERVICES

The primary scope of work is to provide on demand support, routine preventative maintenance service and recommendations for improving existing systems and providing technical support for future designs and purchases of equipment, software, and licenses agreements in coordination with and directed by Waymakers’ Business Manager, CEO and CFO.

Contractor will provide general professional services on an as-needed/as-instructed basis primarily during normal business hours: M-F 8:00 a.m. to 5:00 p.m. either remotely or on-site. However, since many Waymakers programs provide crisis assistance 24/7, the vendor must have mechanisms in place to respond to 24 hours a day 7 days a week, including holidays.

Working in coordination with Waymakers' Business Manager, and as needed with various management team members, the IT service provider will be responsible for the overall management of Waymakers IT component. The following is a general overview of what we are looking for from an IT services provider. It is not meant to be comprehensive.

Initial and Ongoing Assessment

Oversee the lifecycle management of hardware by creating, maintaining, and supporting agency asset inventory records, including onboarding, user management, and offboarding processes with e-waste handling. Advise the agency on hardware nearing end-of-usefulness, recommend replacement strategies, and ensure proper disposal in accordance with agency and funder requirements, while working with staff to procure new equipment as needed. Additionally, review and update the IT inventory list; assess system architecture and equipment for efficiency, life expectancy, capacity, speed, and current processes; and provide recommendations to improve routine support and reduce emergency maintenance situations. Conduct ongoing assessments and recommend enhancements to overall agency efficiency, with an initial assessment report due by November 1, 2026, and subsequent reports due each January 31 for the duration of the contract to support annual budget planning.

Desktop Application Support

Perform basic support functions as needed/requested, including the installation of PC's, laptops, tablets, printers, peripherals, and software. Contractor will diagnose and correct desktop applications issues, configure all computers for standard applications and identify and correct end user hardware problems and perform advanced troubleshooting. Consult with the Business Manager for software license request and be a collaborative partner in the management of licenses which go through a third party account or online portal such as TechSoup or Adobe.

Respond to service calls and take necessary corrective action to keep down time at a minimum.

The consultant shall configure Waymakers' system to enable remote access in a secure environment and provide remote access administration as requested by the DFA.

Server and Workstation Administrative Services

Manage computer network and associated hardware, software, communications and operating systems necessary for the quality, security, performance, availability, recoverability and reliability of the system. Monitor server performance and capacity management services. Ensure scheduled preventive maintenance for equipment is promptly performed. Develop back-up plans and Standard Operating Procedures as appropriate by site and equipment.

The contractor shall be responsible for configuration management, including changes, upgrades, patches, etc.; and support of software products relating to servers and workstations; timely response to repair and maintenance work for the user.

Network Administration Services

Maintenance and support of network equipment, including switches, firewalls, routers and other security devices. Installation and maintenance of printers, scanners, network devices and other computer peripherals. Analyze routine configuration changes and install software patches and upgrades as well as minor cabling if needed.

Complete proactive monitoring of network equipment including alert notifications to the DFA in the event of device failure. Network performance and capacity management services, and network troubleshooting. Maintain network documentation and procedures. The contractor will manage tools within the M365 ecosystem including but not limited to Microsoft Entra/Azure, Microsoft In-Tune (Android and Apple enrollments), Licensing & Billing Management, etc.

Email

The contractor shall manage Waymakers' email system under Microsoft 365 and ensure domain names are maintained properly. As needed and as determined by Waymakers' DFA, the contractor may be responsible for adding, deleting or changing employee email accounts and ensure that each email account is working efficiently and effectively free of uninterrupted errors, and ensure that each individual email account can maintain ample server space.

Security and Backup Efforts

Advise agency on cyber security issues, implement solutions, and be of support with the use or implementation of Cybersecurity tools that are used for providing training and building awareness. Ensure that all servers, desktops and laptops are protected by antivirus software and that adequate firewalls are in place to prevent unwanted intrusion into Waymakers' computer network system. Systems shall be designed to notify Waymakers' Business Manager when system securities are breached and or when system hardware is not operating efficiently. The contractor shall perform security audits as requested and notify Waymakers' Business Manager immediately of suspected breach of security or intrusion detection.

The contractor must assess and make recommendations to maintain compliance with HIPAA and implement appropriate administrative, technical, and physical safeguards to ensure the confidentiality, integrity, and security of Protected Health Information and Personally Identifiable Information.

Assure an adequate back-up system and procedures for critical servers, including an effective recovery process to prevent loss of data and functionality as well as reduce downtime.

Waymakers' current Information Technology (IT) Security Policy and Procedures Manual assigns responsibility for privacy-related matters to a designated Privacy Officer, who provides guidance on issues involving the disposition of protected health information (PHI) and the media on which it may be stored. Additionally, Waymakers designates its subcontracted IT service provider as the Security Officer, responsible for overseeing the security of electronic protected health information (ePHI) and the media on which it may be recorded. The Information Technology Security Policy and Procedures Manual is attached.

Planning

The contractor shall provide technical leadership on server and network technologies, ensuring alignment with organizational goals and long-term infrastructure strategy. Emphasis will be placed on planning, analysis, and design to support informed decision-making.

The contractor shall lead the engineering, planning, and design of system enhancements, including required upgrades and improvements to existing infrastructure. Responsibilities include developing strategic roadmaps for server, storage, backup, and network systems; assessing current environments; and defining adaptable, long-term architecture.

Additionally, the contractor will oversee and coordinate the execution of approved plans/projects, including system installations, upgrades, and data migrations, ensuring that all activities adhere to the established architectural vision and project objectives.

On Demand Response

The contractor shall provide on-demand response to Waymakers' IT requests and maintain accessibility during normal business hours. In addition, the contractor is expected to be available for emergency support outside of standard business hours, including evenings, weekends, and holidays, as needed to address critical issues.

Routine maintenance and system updates should be performed after hours or on weekends whenever possible to minimize disruption to daily operations. All scheduled maintenance activities shall be coordinated in advance with the Business Manager, including agreed-upon dates and times.

PROPOSAL PREPARATION

*Your response must include a reply to each requirement below and **not exceed 15 pages in length.***

In order to facilitate the review process and obtain the maximum degree of comparison, your proposal should include the following information:

SECTION I - PROPOSAL

Title Page

Show request for proposal (RFP) subject, name of proposer's company, address, telephone and fax numbers, name of contact person, and date of submission.

Executive Summary

A one- or two-page summary stating the proposer's understanding of the work to be done and making a positive commitment to perform the work in a timely manner.

Table of Contents

A clear identification of the material by section and page number.

Industry Expertise and Experience

Give a brief overview of your company's history of providing IT support services, especially for nonprofits of similar size and scope. Include background information on the company, including years in business, location of office(s), number of employees, and experience managing Microsoft 365 environments—including Microsoft Entra ID, Intune, and related Microsoft tools used for identity management, device management, security, and collaboration.

Qualifications and Relevant Experience

Describe the company's recent successes and challenges encountered in supporting clients of similar size and scope served within the last three years, including the types of services rendered to each. Additionally, describe any strategies or improvements implemented to address them and enhance service delivery.

Detail your experience in providing the following services: conducting an initial assessment, maintaining an agency's IT asset health and inventory, desktop application support, server and workstation administrative services, network services, email and user management, security and backup efforts, planning and on-demand response.

Please identify the team that will be assigned to the account and describe how you plan to interact with Waymakers and any third-party providers that may provide services.

Proposed Approach and Solution

If required, please provide a proposed work plan for a migration of Waymakers' IT services to your company. Specifically, provide information on key activities, timing, information and/or resource requirements from Waymakers and deliverables as well as key milestones, checkpoints, and other decision points.

Demonstrated customer service quality and support

Describe fully your technical support options including the assistance request process, escalation process, support hours, response times and staffing levels.

Describe any documentation and support that will be available, both from the technical perspective and the end user perspective.

Please describe your experience in successfully supporting users that may be remote and possess limited technical skills.

References

Describe your experience in providing server technology and service for nonprofit customers, including your ability to support organizations with diverse and evolving grant requirements, and your approach to tracking and managing user changes that impact billing. Please include details of three current customer accounts that are similar in scope and requirements to those of Waymakers, highlighting planning, implementation, and ongoing support.

Include references for four (4) organizations of similar size and scope served by the company in the last three years. The information should include the name of the organization and the key contact at the organization (CFO, chair, treasurer, etc.), contact information (e-mail and phone) for the key contact, the

services performed by your firm, and the period of time the reference has been a client of the company. References from non-profit organizations are preferred.

SECTION II - COST PROPOSAL

Due to grant requirements, Waymakers requires specific billing models and a high degree of flexibility to accommodate program- or group-based billing structures. The contractor must be able to adapt billing approaches as needed to align with funding restrictions, reporting requirements, and program-specific allocations.

The contractor shall include a detailed cost statement outlining the proposed fees to perform the services described. This should include a table identifying each level of staff, the corresponding hourly rates, and the estimated hours allocated for services. Additionally, provide an itemized listing of all other proposed expenses or fees, including travel, materials, or ancillary costs.

The proposal must also clearly identify any assumptions, constraints, or conditions that could necessitate adjustments to the proposed fees, including changes in scope, service levels, scheduling, or billing structure requirements.

RFP PROCESS AND INSTRUCTIONS

Expectations of Company

Waymakers requires that prospective vendors

- Disclose any third party outsourced partnerships that may be part of the proposal, including the role and terms of such partnerships.
- Disclose pending litigation or other factors that might impede implementation of the contract.
- Understand and comply with HIPPA regulations.
- Provide services both on-site and remotely.
- Be prepared to make a presentation to the selection committee.
- Upon request, be prepared to provide written response to additional questions.

EVALUATION CRITERIA

The proposals will be evaluated by a on the basis of the following criteria and point ranges:

Company Profile and History	0-20
<ul style="list-style-type: none"> ▪ Company has sufficient size and depth of management, resources and staff to support the services required and ability to maintain continuity of project. ▪ Company has been in business for at least five (5) years providing Information Technology Support Services as the primary function of the business ▪ Adequately explains differentiating factors from competitors and their relevancy. 	
Qualifications and Relevant Experience	0-10
<ul style="list-style-type: none"> ▪ Company demonstrates successful experience in providing specified services for organizations of similar size and scope. ▪ Detail your experience in providing the following services: conducting an initial assessment, maintain agency’s IT assets, desktop application support, server and workstation administrative services, network services, email management, security and backup efforts, planning and on-demand response. ▪ Experience and qualifications of the team assigned to the account for providing services to similar size and scope. Addresses third party/subcontractor relationships 	
Proposed Approach and Solution to Scope of Service	0-20
<ul style="list-style-type: none"> ▪ Proposed work plan details information regarding fulfillment of the project scope. ▪ Proposal addresses key areas of scope including: maintenance of agency IT assets (health and inventory); onboarding & offboarding procedures; backup procedures; lifecycle management; IT efficiency; and cyber security. ▪ Reasonable time estimates for overall project as well as for each major section of the work to be performed. 	
Demonstrated Customer Service Support	0-20
<ul style="list-style-type: none"> ▪ Approach of customer support coverage meets the needs of Waymakers. ▪ Plan adequately addresses 24/7/365 coverage and availability outside of normal business hours. ▪ Successfully supports users that may be remote and possess limited technical skills. 	
References	
<ul style="list-style-type: none"> ▪ Reputation of the business and satisfaction of its services as expressed by current clients and references. ▪ Provided three examples of service contracts. 	0-10
Cost Factor: Cost Proposal	0-20
<ul style="list-style-type: none"> ▪ Explanation of pricing model(s) for ongoing services and one-time costs. Vendor details the cost including all project components, installations, training, implementation and any other associated expenses. 	
TOTAL POINTS	0-100

Anticipated Timeline

Except for the proposal due date and deadline for questions, Waymakers reserves the right to change the timeline without notice.

ELECTION PROCESS	TIMEFRAME
RFP Issuance	June 8, 2026
Deadline for Questions	June 22, 2026
Vendor Proposals Due	June 29, 2026
Notification of Presentation Dates	July 15, 2026
Presentation Dates	July 20-24, 2026
Selection of Vendor	July 31, 2026
Contract Negotiations & Award by Waymakers	August 2026
Project Start Date	September 1, 2026

BID EVALUATION PROCESS

The Selection Committee, comprised of Waymakers staff and Board representation, will be responsible for evaluating the proposals. This team, in accordance with the criteria listed below, will evaluate all proposals received as specified. The committee members, in applying the major criteria to the proposals, may consider additional sub-criteria beyond those listed. During the evaluation period, the team may elect to interview some or all the proposing firms. The individual(s) who will be directly responsible for carrying out the contract, if awarded, should be present at the oral interview.

The final selection will be the firm which, in the committee's opinion, is the most responsive and responsible, meets Waymakers' requirements in providing this service, and is in Waymakers' best interest. Waymakers maintains the sole and exclusive right to evaluate the merits of the proposals received.

Firms will be objectively evaluated based on their responses to the project scope outlined in the RFP. The written proposal should clearly demonstrate how the firm could best satisfy the requirements of Waymakers. Respondents who are eliminated from further competition will be notified by Waymakers as soon as practical.

Waymakers reserves the right to amend this RFP, to cancel this RFP, and/or to make no award under this RFP. Waymakers reserves its right to eliminate an offer at any time for any reason. Waymakers reserves the right to make a full or partial award in response to this RFP.

At any time prior to the deadline for submission of bids, Waymakers may amend the offering documents by issuing addenda. Any addendum issued shall be part of the offering documents and shall be communicated in writing to all who have obtained the offering documents directly from Waymakers.

Waymakers reserves the right to withdraw, or reduce the amount of award or to cancel any contract resulting from this procurement if adequate funding is not available.

Waymakers advertises RFPs on its website