



**REQUEST FOR PROPOSALS
INFORMATION TECHNOLOGY SUPPORT SERVICES**

for

Waymakers

RETURN PROPOSAL TO:

rfp@waymakersoc.org

Waymakers
1221 E. Dyer Road, Suite 120
Santa Ana, CA 92705
ATTN: IT Support Services RFP

DEADLINE FOR PROPOSAL SUBMITTAL:

5:00 p.m., June 28, 2019

**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 5 years.

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 **Friday, June 28, 2019 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

1221 E. Dyer Road, Suite 120
Santa Ana, CA 92705
Attn: IT Support Services RFP

Format: all responses to this RFP should be:

- In pdf format
- Limited to 10 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.

Provider Status

Contractor shall be responsible for all personnel actions including hiring, training, supervision.

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 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 (usually 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 300 employees and utilizes more than 1,500 volunteers each year. Revenue for fiscal year 2017-2018 was just over \$21M. The agency serves more than 120,000 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
Waymakers Corporate – 1221 E. Dyer Road, Ste. 120, Santa Ana	65	6	10	1
CCFSP – Dyer Road Offices, Ste. 220	35	2	2	1
Families First – 2130 E. 4 th Street, Santa Ana	14	1	1	1
Gang Prevention Program – Huntington Beach	1	0	0	0
Project PATH – Dyer Road Offices, Ste. 210	5	1	1	0
Victim Assistance Programs – Dyer Road Offices , Ste. 208	22	0	1	0
Youth Shelter – Huntington Beach	14	1	1	1
Youth Shelter – Laguna Beach	8	1	1	1
Youth Shelter – Tustin	16	1	1	1
YOW – Dyer Road Offices, Bldg. 1231 - Ste. 135	37	1	2	1
YOW-CCFSP Guidance Center – Fountain Valley	12	1	1	1
TOTAL	229	15	21	8

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 accounting system – AccuFund – and is working toward a goal of internal systems and communication that are virtually paperless. Some of the modules included with the transition to the new accounting system include the implementation of electronic time sheet tracking and an employee portal.

Waymakers uses specialized software supporting individual programs and agency overall that include the following Electronic Health Record systems including: Exym, IRIS, Caminar and OQ Analyst. In addition, Waymakers has an offsite icloud storage subscription with idrive. It is also anticipated the selected IT vendor will need to work with communication and printer vendors such as, but not limited to, Telexpress, SCN our alarm company and Konica.

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 the Waymakers’ Director of Finance and Administration (DFA).

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, vendor must be available 24 hours a day 7 days a week, including holidays.

Working in coordination with Waymakers' DFA and the Office Coordinator, 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 Assessment

Review and create the IT inventory list, assess 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. Assess and make recommendations to enhance agency efficiency. An initial assessment report shall be submitted by November 1, 2019 and each January 31st as long as the contract is in force. This is to allow for necessary budget planning for the upcoming year.

Maintain Agency IT Assets

Oversee the Lifecycle Management of Hardware. Advise agency of hardware that is nearing end-of-usefulness, recommend replacement strategies, and dispose of hardware in accordance with agency/funder requirements. Work with agency staff to secure new equipment as required. 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.

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.

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 procedural documentation.

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.

Email

The contractor shall manage Waymakers' email system 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 and implement solutions. 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' DFA 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' DFA immediately of suspected breach of security or intrusion detection.

Assess for HIPPA compliance and make recommendations for any needed changes and implementation plan. Assure an adequate back-up a backup 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 Security Policy and Procedures Manual assigns security responsibility to a designated Privacy Officer for the Agency to obtain advice regarding privacy issues surrounding the disposition of PHI and the media upon which it may be recorded. In addition Waymakers designates the subcontracted IT service provider as the Security Officer to manage the security of its information surrounding the disposition of EPHI and the media upon which it may be recorded. The Information Technology Security Policy and Procedure Manual attached.

Planning

The contractor shall engineer, plan and design services for major system enhancements, including installations and upgrades of new and existing systems. Examples include major server upgrade, storage system upgrades, redesign of backup systems, etc. Provide technical leadership for server technology issues. Make recommendations for future purchases of hardware, software and technology needs. Install new servers, software and hardware and transfer data when acquired. Strategic planning, design and installation/upgrade of core network systems. Examples include major network upgrades, provider changes, transition to cloud-based storage systems, IP schema design, installation of core network devices, etc.

On Demand Response

The contractor shall offer on-demand response to the Waymakers' IT requests. The contractor shall have access and be available during the Waymakers' normal business hours. It is expected that contractor is to

perform maintenance service after hours and on weekends in situations which would least likely disrupt daily operations. Specific times and dates shall be coordinated with the DFA.

PROPOSAL PREPARATION

*Your response must include a reply to each requirement below and **not exceed 10 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) and the number of employees.

Qualifications and Relevant Experience

Give a brief overview of your company's history of providing IT support services. Describe company's recent experience with other nonprofits of similar size and scope served by your company in the last three years and types of services rendered to each.

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.

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

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.

Please describe your organization's experience in transitioning clients to public or private cloud technology from more traditional IT service models.

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 your customers, focusing on planning, implementation, and ongoing support. Please provide details of three current customer accounts that are similar in scope and requirements to those of Waymakers.

Include references for four (4) nonprofit organizations of similar size and scope served by the company in the last three years. The information should include the name of the nonprofit 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.

SECTION II - COST PROPOSAL

Include a cost statement showing proposed fees to perform the services outlined. This information should include a table identifying each level of staff hours planned for services at the proposed rates and an itemized listing of all other expenses or fees proposed, including travel. Identify any conditions that would cause the firm to request a change in the proposed fee.

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 nonprofits 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; inventory procedures; backup procedures; lifecycle management; IT efficiency; and cyber security. ▪ Reasonableness 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. ▪ Gives 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 cost. 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 11, 2019
Deadline for Questions	June 24, 2019
Vendor Proposals Due	June 28, 2019
Notification of Presentation Dates	July 10, 2019
Presentation Dates	July 15-19, 2019
Selection of Vendor	July 26, 2019
Contract Negotiations & Award by Waymakers	August 2019
Project Start Date	September 1, 2019

BID EVALUATION PROCESS

The Selection Committee, comprised of Organization 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 Organization 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 Organization's opinion, is the most responsive and responsible, meets the Organization's requirements in providing this service, and is in the Organization's best interest. The Organization 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 Organization. Respondents who are eliminated from further competition will be notified by the Organization 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