

Tech & Operations Support RFP

I. ORGANIZATIONAL BACKGROUND

The Pacific Council's mission is to enhance the impact of the West Coast on global issues and public policy. We inform and engage leaders and galvanize them to effect change on global issues. We build strong networks to stimulate informed dialogue and collaboration. We focus our work on issues that allow us to have maximum impact. pacificcouncil.org

II. PROJECT OVERVIEW

The Pacific Council seeks a contractor or vendor to help support immediate and ongoing technology and operational support needs. This includes improving the organization's technological infrastructure and providing on-site or virtual technology support.

III. PROJECT GOALS

Our ideal contractor / vendor is willing and able to help the Council:

- Assess existing tech and operations workflows
- Make recommendations that improve business processes / efficiencies
- Identify vendors to help implement recommendations
- Implement transitions to new technology (software and hardware)
- Troubleshoot / provide tech support for Microsoft and Apple devices, existing technology infrastructure (through transition).

IV. SCOPE OF WORK

The Scope of Work includes these onsite and virtual deliverables:

Immediate project needs:

- Transition in-person servers to single cloud-based provider
- Transition full office team from PC to Apple-based hardware and software
- Assess technology infrastructure; recommend and implement software and hardware that improves organizational efficiency.

Ongoing support

- Provide onsite and virtual troubleshooting and tech support for Microsoft and Apple devices.
- Restart onsite servers as needed (until cloud transition)
- Set up / change phone lines as needed
- Provide advice and support related to other technology issues, including email and web security and office software and applications

Tech & Operations Support RFP

Additional project outputs

- Technology transitions
- Workflow assessment
- Recommendations: best practices
- Recommendations: vendors
- Ongoing tech support / troubleshooting

V. ELIGIBILITY / EVALUATION METRICS & CRITERIA

A. Eligibility

The ideal bidder will have the following.

- a. Knowledge of and experience in:
 - Setting up VPN
 - Setting up phone lines
 - Cloud-based storage best practices
 - Apple devices and integrations
 - Setup up and troubleshooting remote desktop
- b. Knowledge of and experience working with the Council's existing platforms:
 - Vonage (Phone service/ phone app)
 - Team Viewer (Remote desktop)
 - SonicWall (firewall, VPN)
 - Microsoft Suite
 - Google Suite (for Digital collaboration)
 - Salesforce (Donor/member database)
 - FormTitan (Survey platform)
 - Drupal (Website platform)
 - ClickUp (Project management platform)
- c. Innovative and experiential mindset.

B. Evaluation Metrics & Criteria

Successful completion of the project includes:

- Completion of deliverables outlined in section 4.
- Quality and relevance of project outputs
- Timeline progress
- Providing satisfactory in-person and remote technology support

Tech & Operations Support RFP

VI. MILESTONE DELIVERABLES / DEADLINES

Project Timeline:

Milestone / deliverable	Deadline / Completion date
Project initiation phase	October 29, 2021
Project planning phase <i>Project planning phase will determine the timeline/schedule for the remaining phases of the project</i>	November 19, 2021
Project execution phase	January 21, 2022
Ongoing troubleshooting support <i>To occur as needed</i>	Contract term of 3 months, with potential for renewal.

VII. CURRENT ROADBLOCKS AND BARRIERS TO SUCCESS

- Operating systems are outdated;
- Staff technology is split Apple and PC;
- Data retention happening between multiple servers;
- Tech support is limited to hard-wired service only (phone and physical servers);
- Part of this project relates to accommodating a hybrid or fully remote workforce as part of a subletting process. The Council does not have a firm timeframe on when our unit will be sublet.

VIII. SUBMISSION REQUIREMENTS

Please submit proposals to hr@pacificcouncil.org using the subject line “Tech & Operations Proposal.” No phone calls, please.

A. Elements of Proposal

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in planning and building technology infrastructure
- Description of experience with the above-mentioned platforms in 5-A. and 5-B. If inexperienced in an area or with a specific platform, please indicate experience in a similar area / with a similar platform.
- Examples of 3 technology-infrastructure related-projects – designed and implemented by you and / or your organization
- Testimonials from past clients on technology infrastructure creation and technology support
- Anticipated resources you will assign to this project (total number of people, role, title, experience)
- Description of how you would offer ongoing onsite and remote technology support
- Timeframe for completion of the initial project

Tech & Operations Support RFP

- Project management methodology
- Technology troubleshooting methodology
- Price quote for services

B. Additional materials

- Resume of all individuals who will support this project
- Budget requirements
- Proof of full COVID-19 vaccination

IX. REQUEST FOR PROPOSAL TIMELINE

Milestone	Date / Timeframe
Request for Proposal timeline	All proposals in response to this RFP are due no later than 5:00 pm Pacific Time September 30, 2021.
Evaluation of proposals	Conducted from October 1, 2021 until October 15, 2021 <i>If additional information or discussions are needed with any bidders during this two-week window, the bidder(s) will be notified.</i>
Selection decision for the winning bidder	No later than October 18, 2021 <i>Upon notification, the contract negotiation with the winning bidder will begin immediately. Contract negotiations will be completed by October 31, 2021</i>
Notifications to bidders who were not selected	Completed by November 20, 2021

X. PROPOSAL EVALUATION CRITERIA

The Pacific Council will evaluate all proposals based on the following criteria. To ensure consideration for this Request for Proposal, your proposal should be complete and include all of the following criteria:

- **Overall proposal suitability**
proposed solution(s) must meet the scope and needs included herein and be presented in a clear and organized manner
- **Experience**
Bidders will be evaluated on their experience as it pertains to the scope of this project
- **Previous work**
Bidders will be evaluated on examples of their work pertaining to technology infrastructure-building and technology support, such as client testimonials and references
- **Value and cost**
Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project

Tech & Operations Support RFP

- **Technical expertise and experience**

Bidders must provide descriptions and documentation of technical expertise and experience

XI. FURTHER INFO AND / OR QUESTIONS

If you have questions, contact our Strategy & Operations team via: info@pacificcouncil.org.

No phone calls, please.

XII. RFP TERMS AND CONDITIONS

By submitting a response to proposal, all interested bidders agree to the following Pacific Council organizational policies:

- A. COVID-19 policies.
 - a. *Vaccination*. Bidder agrees to be fully vaccinated prior to the contract's Effective Date. Bidder further agrees to provide proof of vaccination upon arrival at the worksite.
 - b. *Office safety*. Bidder agrees to follow all state, county, building, and office COVID-19 safety policies, including but not limited to mask requirements, social distancing, and office and personal hygiene policies.
- B. Key organizational policies including, but not limited to, applicable codes of conduct, whistleblower, confidentiality agreement, document retention / destruction, and gift acceptance policies and operational procedures.