

# REQUEST FOR PROPOSAL

## FOR

### Nonprofit Technology Assessment

Issued: November 17, 2017

Proposals due on or before: December 15, 2017

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# Introduction

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## Purpose for RFP

Three Rivers Community Action, Inc. is seeking a consultant to help the agency determine its technology needs and formulate a technology implementation plan. Three Rivers invites qualified providers to submit a proposal and statement of qualifications for a nonprofit technology assessment. The assessment will include an evaluation of the agency's current technology, an analysis of Three Rivers' technology needs, and the design of a technology implementation plan. The technology plan will help Three Rivers' design a technology system that maximizes resources available at free or reduced cost to nonprofits. The plan will include specific recommendations on implementation including assistance with hiring recommended staff.

## Introduction to Three Rivers Community Action

Three Rivers Community Action (hereafter referred to as Three Rivers or the Agency) is a private nonprofit corporation that has been in existence since 1966. The agency provides services to address basic human needs in our primary service area of Olmsted, Goodhue, Wabasha and Rice Counties in southeastern Minnesota. We also provide limited services across 20 counties in southeastern and south central Minnesota.

Three Rivers provides many services designed to end poverty and create a path to self-sufficiency. Head Start provides educational services and family support for households with young children. Transportation (Hiawathaland Transit) connects people to services and employment. Energy programs reduce utility costs through emergency assistance and home system improvements. Support services help residents work out of poverty and homelessness. Three Rivers also owns and develops affordable housing, provides financial coaching and homebuyer readiness assistance, and facilitates the regional Continuum of Care.

## Mission Statement

The mission of Three Rivers Community Action, Inc. is to work with community partners to address basic human needs of people in our service area, thereby improving the quality of life of the individual, family and community.

## Locations

Staff, and technology, are located at 4 main office locations – Zumbrota, Plainview, Rochester and Faribault, MN. We also have specialized staff in other work space in Faribault, Northfield, Red Wing, Wabasha, and Winona, MN, as well as Pittsburgh, PA, with 14 staffed locations in total.

## Existing Technological Environment

Three Rivers is currently using Marco as a managed IT provider with cloud hosting. Marco hosts the agency's data on 5 servers in their data center. The cloud hosts software, file storage (individual and shared), and user profiles. Staff call Marco support for any technology issues they have, with most issues resolved remotely. As needed, Marco provides on-site support to office locations. Marco also has the agency's telephone support contract.

Three Rivers has a technology team made up of 6 staff members who meet monthly to analyze, strategize and troubleshoot the agency's technology. We currently have 1 full time IT staff person who supports the transportation department's specific infrastructure needs.

The current Three Rivers IT structure is missing several things:

- An IT expert to lead agency technology planning and problem solving
- Someone to design and implement HIPPA and data privacy safeguards, and other IT policy
- A person to deploy new technology
- Management of shared resources

Currently, the Agency's technology encompasses:

- 160 staff, 100 of these jobs require computers
- 13 networked locations
- 53 desktop computers
- 71 laptop computers
- 11 network printers, leased from Marco
- 100 agency telephones and a Mitel server & system with switches in Zumbrota and Faribault
- A transportation system and dispatch center that operates 20 hours per day, every day of the week
- 30 cell phones and 80 tablets assigned directly to staff

Specialized software currently in use includes:

- Microsoft SharePoint for Website and internal site
- Office 365 – includes Skype for Business for web meetings
- Adobe Acrobat
- Orion financial reporting
- Laserfiche - workflow for the Energy Assistance department
- Trapeze – routing for the Transportation department
- MFiles – Fiscal and HR workflow and storage
- Childs Plus – tracking database for early childhood department
- CAP60 – tracking database (online) for all agency clients
- Housing Developer Pro – software for housing department
- Wx Assistant – software for weatherization department
- Cisco Iron Port – encryption and spam filtering software
- Several internet based, program specific softwares operated by various funders

## Request for Proposal (RFP)

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### Purpose of RFP

Three Rivers Community Action is soliciting proposals for a contractor to conduct an analysis and assessment of the agency's technology needs and formulate a technology implementation plan. The selected agency or company will identify opportunities for improvement and propose tactical recommendations for immediate remediation as well as a long term technology road map. The main deliverable will be the completion of a Technology Assessment Report that includes recommendations for implementation of technology strategies.

## Description of Project and Deliverables

Project Deliverables under this contract will consist of:

- Weekly, or as often as deemed necessary, meetings with leadership staff person(s) at Three Rivers to discuss progress and unique issues that may arise
- Development of understanding of agency support needs
- A Technology Assessment Report
  - Detailed analysis and assessment of existing IT systems
  - Develop an implementation plan with practical recommendations, including cost and time frame of implementation. The plan will lay out alternative options as applicable.
  - Identify high risk IT issues needing immediate attention and develop a plan to address them including cost and time frame of implementation.
  - Deliver a detailed technology road map to address long term solutions for hosting, networking, telephones, and Website, including cost, and time frame of implementation.
  - Recommend specific staffing and/or consultant relationships for the implementation
  - Report should consider:
    - Accessibility of technology solutions and ability to share information across locations and departments
    - Cyber security needs
    - Considerations for future growth, including additional staff, new sites, etc.
    - Potential for telecommuting
    - Training needs of users
    - Maintenance needs
    - Equipment replacement needs
    - Cost effectiveness of solutions – including utilizing technology that is offered for a free or reduced price to non-profits
    - Good value rather than just inexpensive
    - Simple and user-friendly solutions
    - Identified costs are traceable to the users and/or programs that they support in order to cost allocate technology solutions to programs
- Assistance in procuring staff or services recommended in the report
- A presentation to the Technology Team including review of the Technology Assessment Report

## Inquiries/Contact Information

Questions about this RFP may be directed to Kindra Papenfus, CFO at (507) 732-8531 or [kpapenfus@threeriverscap.org](mailto:kpapenfus@threeriverscap.org)

## Timeline

- Issue RFP to vendors: November 17, 2017
- Proposals due at Three Rivers Community Action: December 15, 2017 - 4:00 p.m. CST
- Award of Contract: December 29, 2017
- Project Implementation: January 2, 2018 – March 31, 2018

## Proposal Submission Requirements

Please submit the following items with the proposal:

1. Letter of Transmittal, including:
  - a. Letterhead, containing Company Name, address and Telephone numbers
  - b. Name, Title, address, e-mail address and telephone number of the person to contact who is authorized to represent the firm and to whom correspondence should be directed
  - c. Federal taxpayer ID for the firm
  - d. A brief statement of your understanding of the services to be performed
  - e. Signature of an officer or other individual who is legally authorized to bind the applicant to the proposal cost and schedule
2. General Vendor information, including length of time in business, length of time providing the proposed services, total number of clients, number of personnel and location of office that would service this account.
3. Describe how your firm is positioned to provide the services listed above and a history of your experience providing similar services. Explain any history you have working with nonprofits, including knowledge of resources available to nonprofits.
4. Describe your approach and methodology for providing these services.
5. Provide the name, title, address and telephone number of three references for clients whom you have provided similar services. Please provide information on the actual services provided, customer size, and length of tenure providing services to this client. Nonprofit references preferred.
6. Staff Resources – identify the names of principal staff and key personnel who will provide the service. Please submit resumes or qualifications for each key staff person, summarizing their experience and expertise. Describe each person’s role and responsibility with the project. Any substitutions of staff upon contract award must be done at the approval of Three Rivers.
7. Proposed timeline for the project
8. Total proposed project cost

## Proposal Delivery and Due Date

Proposals are due on or before **4:00 p.m. on Friday, December 15, 2017**. Delivery of proposals should be made electronically to Donna Stamschror at [dstamschror@threeriverscap.org](mailto:dstamschror@threeriverscap.org) with “Technology Proposal” in the subject line, PDF format preferred. You will be sent an email receipt. If you do not

receive a receipt within 2 business days, please contact our office to inquire. If you have large file size items, please provide a file sharing link (Dropbox or equivalent) with instructions for accessing the proposal materials.

## Evaluation Criteria

Proposals will be evaluated upon the contractor's responsiveness to the RFP, qualifications and the total price quoted for all items covered by the RFP. The following elements will be reviewed, scored and a decision made based on the responses:

- Skill and experience of firm and its key personnel
- Demonstrated experience with similar projects, particularly work with nonprofits
- Compliance with administrative requirements of the request for proposal format, due dates, etc.
- Description of Services
- Timeline of project, including information gathering and final report production
- Budget/Cost
- Results of communications with references supplied by contractor
- Ability/commitment to meeting time deadlines
- Contractor's financial stability

The successful contractor may be asked to participate in negotiations and may be asked to make revisions to their proposal based on their negotiations. In submitting a proposal, each contractor acknowledges that they have read and understand these requirements.

## Award of Contract

Award of the contract resulting from this RFP will be based upon the most responsive contractor whose offer will be the most advantageous to Three Rivers in terms of cost, functionality, experience, quality of past work, and other factors as specified elsewhere in this RFP.

Three Rivers reserves the right to:

- Consider proposals based on their relative merit, risk, and values to the organization;
- Negotiate with all respondents to the RFP;
- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential contractor, when it is in the Agency's best interest; and
- Accept other than the lowest priced offer.

Competitive proposals will be considered and will result in a Fixed Price Contract. Selection will be made on or before December 29, 2017.

## Rejection of Proposals

Three Rivers Community Action reserves the right to accept or reject any and all proposals and to waive any minor discrepancies or technicalities in the proposal or specifications, which are required to complete this project, or when deemed to be in the best interest of Three Rivers Community Action, Inc.

## **Confidentiality**

All information presented in this RFP, including information subsequently disclosed by Three Rivers Community Action, Inc. during the proposal process, shall be considered confidential and should not be released to outside parties. This document represents a request for proposal only and in no way should be construed as a contract or letter of intent.

## **Project Deliverables**

All recommendations identified during this engagement will be documented and reviewed with Three Rivers Community Action, Inc. management. All deliverables produced during the engagement are for the sole use of Three Rivers Community Action, Inc. management. All work papers, analyses and final reports will remain the property of Three Rivers Community Action, Inc.

## **Cost of proposal**

The Respondent shall bear all costs associated with the proposal meeting(s), interview(s), preparation and submission of the bid and Three Rivers Community Action, Inc. shall in no case be responsible or liable for those costs, regardless of the conduct or outcome of the solicitation.