



Request for Proposals (RFP)

Senior Strategic IT Advisor

The Public Health Institute (PHI) is seeking proposals to provide Senior Strategic Information Technology Advisor (SSIA) services to the organization. The goal of the virtual SSIA is to play a strategic role in advising and operationalizing PHI's technology strategy and ensuring seamless integration of technology to support our mission. The SSIA will provide a forward-thinking mindset for leveraging technology to enhance operational efficiency, cyber security, knowledge management and technologies that support optimal organizational effectiveness.

SUBMISSION OF PROPOSALS & CLOSING TIME

Please submit questions and proposals to: Kristine Smith, ksmith2@phi.org

Questions are due by: November 20, 2024

Proposals are due by: December 2, 2024

BACKGROUND

PHI (<https://www.phi.org>) is dedicated to improving health and wellness by discovering new research, strengthening key partnerships and programs, and advancing sound health policies. During its more than 60 years as an independent nonprofit, the Public Health Institute has led and managed hundreds of projects and programs ranging from single contracts to large, multi-site research programs with national and international significance. PHI has close to 1,000 total employees, with approximately 135 central office staff supporting program employees in more than 60 different public health related programs.

PHI seeks to explore the delivery and utilization of IT technology across the organization. In collaboration with current leadership and functional business leads, the SSIA will provide actionable recommendations to align PHI's technology initiatives with its business goals, including activities to strengthen cyber security, engage with IT strategic planning, risk management, compliance, knowledge management and the cadenced implementation of new technologies to streamline processes.

SCOPE OF WORK

The Scope of Work, which may be further defined in the final executed contract between the selected service provider and PHI, is described below.

Cyber Security, Risk Management and Compliance

- Review existing cyber security measures and recommend actionable enhancements to the cybersecurity program.
- Recommend sponsored program cyber security baseline standards and implementation road map.

- In partnership with the Compliance and Ethics department, keep the organization informed about relevant laws and regulations to ensure the organization's ongoing compliance with data protection standards and cybersecurity trends.

Strategic Planning

- Conduct an assessment of current IT architecture, including infrastructure, hardware, and software applications.
- Support collaboration between the IT department and cross-functional teams to understand technology needs and advise on solutions that enhance their effectiveness. Partner closely with business process and system modernization-related efforts.
- Review and make recommendations regarding IT business continuity and disaster recovery plans.
- Recommend an insource and outsource technology consumption framework by defining optimal internal capacities and consideration of outsourced external providers in the areas of hardware, software, and support. The recommendations should be based on specific criteria such as strategic business objectives, functional needs, work culture, long-term scalability, resilience/sustainability, cost-effectiveness, and sector trends.
- Lead the creation of a comprehensive IT application architecture strategy and governance framework, aligned with PHI's strategic objectives. The strategy should be informed by sector knowledge, standard practices, trends, and emerging technologies.
- Identify opportunities for cost savings and optimization of IT resources.
- Present findings and recommendations to the Executive Vice President and COO.

Coaching and Mentoring

- Support performance-based coaching to strengthen IT leadership.
- Share best practices for communication, knowledge management and IT trends to promote an informed IT culture within the organization.

FEE STRUCTURE

PHI is open to discussing a fee structure either as a monthly flat amount or an hourly rate.

PROPOSAL FORMAT

For PHI to conduct the most efficient proposal evaluation possible, interested service providers should include the following information in their submission. Submissions should not exceed 10 pages in total.

1. **Cover Letter and Provider Overview:** Cover Letter and Primary Contact Information. A brief overview of the provider's history, mission, and relevant experience.
2. **Experience and Qualifications.** A description of the provider's experience providing senior strategic IT services, particularly in nonprofit organizations. Experience with fiscal sponsors is

a plus. If relevant, please provide a list of the provider's certifications and qualifications related to IT service delivery and management.

3. **Approach to providing services.** A description of the provider's process for assessing the nonprofit organization's IT needs and developing a plan for addressing those needs.
4. **Proposed Fee Structure.** A proposed fee structure that falls within the range specified above.
5. **Diversity and inclusion.** Information on small business certifications, description of commitment to diversity and equitable and inclusive practices.
6. **References.** A list of references from other nonprofit organizations who have received similar services from the provider.

EVALUATION CRITERIA

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI. Proposals will be evaluated based on the criteria outlined below.

1. Provider skills and experience as aligned with PHI's organizational needs, including client references
2. Cost and Value
3. Commitment to diversity and equitable and inclusive practices

LOCATION

Remote. Ability to accommodate Pacific Time Zone hours is important. Consideration of any in-person meetings will be discussed separately.

TIMELINE

Anticipated one year commitment, subject to contract negotiation

SOLICITATION GUIDELINES

1. Confidentiality

All non-public information concerning this RFP, including any related information that is subsequently disclosed by PHI during the proposal process, is PHI's confidential information. Respondents will not disclose any non-public information or use it for any purpose other than responding to the RFP without PHI's prior written consent, except as required by law. Submission of a proposal constitutes acceptance of these terms.

2. Discretion and Not Binding

This RFP is a solicitation for proposals only and neither the issuance of this RFP nor the submission of a responsive proposal shall be binding on PHI. PHI reserves the right to accept or reject any or all proposals, or to cancel this RFP for any reason or no reason at any time. No binding agreement shall exist with respect to the provision of services for the Project Description, unless and until a definitive agreement has been fully executed in writing by both PHI and the selected Respondent. PHI shall not be liable under any circumstances for any expenses incurred by any Respondent in connection with the RFP, proposal submission or selection process.

3. Pricing

Prices must be inclusive of all costs, including taxes and fees, in U.S. dollars. Rates should remain

valid for 180 days from submission.

4. Proposal Costs

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.

5. Right to Waive Re-proposal

PHI reserves the right to waive irregularities and technicalities and request re-proposals.

6. Conflict of Interest

All Respondents must disclose with their RFP the name of any officer, director or agent who is also an employee of PHI. Further, all Respondents must disclose the name of any PHI employee who owns, directly or indirectly, an interest of more than five percent (5%) in the Respondent's provider, subsidiaries, branches, or parent company.

7. Federal and State Tax

PHI is exempt from federal tax, state sales and service tax and state tax for tangible personal property. Respondents doing business with PHI shall not be exempted from paying sales tax to their suppliers for materials to fulfill contractual obligations with PHI, nor shall any Respondent be authorized to use the PHI's tax exemption number in securing such materials.

8. Contingency Fees

The Respondent warrants that no person or selling agency has been employed or retained to solicit or secure a contract herewith for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees or bona fide established commercial or selling agencies maintained by the proposer for the purpose of securing business. For breach of violation of this warrant, the board shall have the right to annul any resolving contract without liability or, in its decision, to deduct from the contract price without consideration or otherwise recover the full amount of such commissions, percentage, brokerage or contingent fee.

9. Compliant Proposals

Respondents are advised to study all instructions, requirements, and other information in this RFP carefully. Respondents must:

- Comply with all requirements set out in this RFP
- Respond to each element in the order as set out in this RFP
- Include all supporting documentation as specified in this RFP
- Submit proposals as specified in this RFP

DIVERSITY AND INCLUSION

PHI is dedicated to promoting diversity, equity, and inclusion in its procurement of goods and services. Pursuant to PHI's commitment to diversity and inclusion, PHI encourages participation of providers that can provide documentation of their commitment to diversity and equitable and inclusive practices and are certified as any of the following businesses:

- WOSB: Women-Owned Small Business
- SDVO: Service-Disabled Veteran-Owned Business

- HUBZone: Historically Underutilized Business Zone
- SDB: Small Disadvantaged Business
- 8(a)BD: African American, Asian Pacific American, Hispanic American, Native American, Subcontinent Asian American