

REQUEST FOR PROPOSALS: SHAREPOINT IMPLEMENTATION

A. Introduction

The Public Health Institute (PHI) is a global leader in public health. PHI is dedicated to promoting health, well-being and quality of life for people around the world through innovative solutions and collaborative partnerships. Through this Request for Proposals (RFP), PHI seeks bidders to provide the services and specifications as outlined below.

B. Proposal Format

In order for PHI to conduct the most efficient proposal evaluation, bidders are required to include the following information in their proposals as described below:

1. **Corporate Overview** – A description of the bidder and a list of references
2. **Price Proposal** – A description of the bidder’s price schedule (monthly/yearly/discounts)
3. **Contact Information** – A statement of main point of contact for negotiations

C. Submission of Proposals & Closing Time

Please submit proposals to: **Shawn Yeh**
Email: syeh@phi.org

Proposals are due by: **Monday February 10, 2025**
9:00am – Pacific Standard Time

- Proposals must be submitted via email by the date and time specified above.
- PHI encourages inquiries concerning this RFP. All questions pertaining to this RFP must be made via email to syeh@phi.org. Questions are due by 5:00 PM PT, Friday January 31, 2025.
- Bidders should retain a copy of their application and accompanying enclosures for their records

PHI intends to follow the below timeline for review and award of this solicitation:

Questions Due:	January 31, 5:00 PM (PT)
Deadline for Submittal:	February 10, 9:00 AM (PT)
Review of Proposals:	February 10 – February 28, 2025
Interviews or Additional Questions Conducted:	February 10 – February 28, 2025
Vendor Selected:	February 28, 2025

D. Solicitation Guidelines

1. Agreement

PHI intends to issue a Fixed Cost agreement to the successful bidder from this procurement process. The agreement will outline approved billing rates for each type of service provided and the terms and conditions applicable to the work performed.

2. Discretion

PHI may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. PHI may also, at its sole discretion, choose to issue as many or as few agreements as deemed necessary to meet PHI's business needs.

3. Offers/Quotations

Prices must be inclusive of all costs, including taxes and fees, in US Dollars. Quotes prices should remain valid for thirty (30) calendar days from proposal submission.

4. Proposal Costs

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

5. Proposal Evaluation

PHI will select the bidders whose offer will provide the most favorable mix of corporate credentials and cost, thereby ensuring overall best value procurement.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI:

- Technical Capacities
- Pricing and Value
- Delivery and Payment Terms
- The organization, completeness, and quality of the proposal
- Information Provided by References
- Diversity and Inclusion
- Other factors PHI determines to be relevant

E. Required Services / Specifications

1. Service Type(s): Professional services

2. Specification(s):

1. Migrate files from on-prem file share to SharePoint/OneDrive
 - a. Determine and implement best practice site structure and hierarchy
 - b. Determine and implement best practice permission structure
 - c. Determine and implement best practice policies to apply (e.g. data retention)
 - d. Determine and implement best practice for site/group creation and visibility
 - e. Advise on best practice security and data privacy compliance

- f. Advise on best practice filename and file path naming conventions
 - g. Migrate approximately 10TB of data to SharePoint/OneDrive
 2. Organize SharePoint with PHI's organizational structure in mind
 - a. Central staff organization vs Program staff suborganizations using Central organization Microsoft accounts vs Program staff suborganizations not using Central organization Microsoft accounts vs outside 3rd parties
 - b. PHI currently has about ~170 Central staff vs ~800 Program staff
 3. Clean up existing SharePoint sites/Microsoft Teams/365 Groups
 4. Train IT staff on SharePoint and OneDrive use and administration
 - a. Include best practices
 - b. Train IT staff on how best to train end users on SharePoint/OneDrive use and onboard new hires
 5. Train end users on SharePoint and OneDrive use and best practices
 - a. Viewing level of permission and access
 - b. SharePoint and Teams integration and functionality
 - c. Conduct training sessions for end users
 - d. Customized trainings for specific use cases. Examples include:
 - i. Sharing sites vs sharing folders/files within Central, with Programs, and/or with outside parties
 - ii. Offboarding site/file Owners
 - iii. Using and sharing shared OneNote notebooks
 6. Entra administration
 - a. Best practice with on-prem user sync and access (Mailbox Users and Mail Users)
 - b. Core users vs extended user base (some may have multiple Microsoft accounts) vs guest accounts
 7. Set of recommendations for further development

3. Statement of Work:

- Examples of similar solutions performed by the responding professional services team along with an overview of the team composition.
 - The name, title, telephone number and email address of the individual who will be the principal contact for PHI
 - Detailed outline and timelines for accomplishing the work
 - A summary description of the proposed approach and timing for completing the Services requested - including details on how the Respondent would engage with PHI, the availability of professional services teams (including any current product, shipping, or time constraints), and description of any / all tools, templates, documentation, etc. offered as part of the proposed approach.
 - References from previous clients of similar work
- 4. Location(s):** PHI's staff work remotely, and in multiple time zones. The work will need to take place with that consideration in mind.
- 5. Other Requirement(s):** Experience working with non-profits, federated organizations, and Fiscal Sponsors are important factors in selection.

6. Diversity and Inclusion Initiative

PHI is dedicated to promoting diversity in its procurement of goods and services. Pursuant to PHI's commitment to diversity, PHI encourages vendors that 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