

Request for Proposals

Information Technology Services and Support

Worksystems is seeking a qualified and experienced organization to provide full-service and on-demand small business Information Technology solutions.

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Part I: Introduction

Worksystems is a non-profit agency that supports economic growth in the City of Portland, Multnomah, and Washington counties by pursuing and investing resources to improve the quality of the workforce. We design and coordinate workforce development programs and services delivered through a network of partners to help people acquire the skills, training, and education they need to go to work or to advance in their careers. Our partners include employers, labor groups, government, community colleges, high schools, and community-based and economic development organizations. Since 1998, Worksystems has invested over \$300 million in our community.

Worksystems is seeking competitive proposals to select a Contractor to provide Information Technology (IT) solutions and support as identified within this solicitation.

Part II: Background

Worksystems maintains three primary IT environments that require on-demand IT solutions and support.

Worksystems Office

The Worksystems office is located at 1618 SW First Ave., Suite 450, Portland, OR 97201. Worksystems is moving to a new location during the 2024-2025 year. This location will be within five miles of the existing location.

Worksystems currently employs approximately 50 staff. Worksystems employs one full-time *IT Helpdesk Technician* who is responsible for Tier 1 level staff support. This Worksystems employee will assist with staff onboarding and offboarding, training users, helping to make recommendations that support staff business processes, responding to staff tickets, managing tickets, and escalating more complex tickets to the selected Contractor for resolution. Worksystems also employs an *Information Systems Director* who manages the *IT Helpdesk Technician* and approves IT related purchases, projects, and Contractor billing.

Most of Worksystems' employees work remotely. The office is available for hybrid workers and for on-site meetings or conferences. There are currently three meeting spaces with technology – projectors, TVs, cameras, phones, etc. Some equipment may require modernization with the planned move.

The Worksystems office has a wireless Local-Area Network (LAN), a Wide-Area Network (WAN) for some remote users, and servers for general storage and backups. Worksystems has implemented the cloud-based Microsoft Office 365 for email and file storage.

Many servers have reached end-of-service life and require offboarding. The move to Microsoft Office 365 cloud solutions will require fewer servers. Updates to all office equipment must align with the Worksystems office move.

Colocation

The Colocation site is located in Downtown Portland, OR and is an offsite location where two servers are stored. These servers house our proprietary software product – a web-based participant tracking and reporting database that is licensed by third parties. The two servers located at this site were purchased in 2024 and contain 8 virtual guests for production, testing, and development SQL Server databases and web services.



Worksystems employs a *Database Administrator* who manages the proprietary software product and will collaborate with the selected Contractor.

WorkSource Portland Metro Centers

There are currently seven [WorkSource Portland Metro \(WSPM\) Centers](#) across the Portland Metropolitan Area (Hillsboro, Tigard, NE Portland, SE Portland, Gresham, and Downtown Portland) and two additional limited use resource rooms in the Inverness and Washington County Jails. The WSPM Centers have two or more partner organizations collocated, such as the Oregon Employment Department, sharing server rooms. Worksystems oversees the resource rooms and computer labs in all WSPM Centers. Resource rooms are available to job seekers in the community and offer full-service desktops and printers. The computer labs are used by job seekers in the community to attend workshops led by WSPM Center staff and to conduct job searches.

Across all locations, there are approximately 200 desktop computers, six printers, and each WSPM Center has one server.

Part III: Contracting Details

Contracts resulting from this Request for Proposal (RFP) are anticipated to begin by October 1, 2024 through June 30, 2025. Additional years' funding may be contracted for up to four one-year extensions through June 30, 2029, at a funding level to be determined each year based on available funds. Worksystems will negotiate final budgets with the successful respondents.

Part IV: Contractor Qualifications and Requirements

Independent Contractor

As part of the contracting process with Worksystems, the Contractor is required to represent and warrant to Worksystems that they are customarily engaged in an independently established business providing the same or similar services to the services they will provide to Worksystems; that Contractor holds themselves out to the public as being engaged in an independently established business; and that the Contractor is responsible for maintaining all state and federally-required licenses for the operation of such business. An independent contractor is not an agent or employee of Worksystems and in performing their duties and fulfilling their obligations shall be free from direction and control over the means and manner of providing such Services, subject only to the right of Worksystems to specify the desired results.

Selected Contractor must meet the following Contractor requirements:

- Have comprehensive network support services and expertise in administering systems and servers related to district Local-Area Network (LAN) and Wide-Area Network (WAN) systems.
- Complete contracted work in a manner that adheres to the highest levels of security and confidentiality.
- Comply with IT standards required for our business.
- Ability to complete systems analysis to create action plans.
- Have staffing available to always provide necessary coverage, which may include emergency coverage outside of normal business hours.
- Ability to work with diverse individuals and/or groups.

- Ability to convey technical information to non-technical audiences.
- Ability to invoice by Worksystems' three primary IT environments described above in [Part II: Background](#).
- Selected Contractor is required to represent and warrant to Worksystems that they are an Independent Contractor customarily engaged in an independently established business providing the same or similar services to the services they will provide to Worksystems; that Contractor holds themselves out to the public as being engaged in an independently established business; and that the Contractor is responsible for maintaining all state and federally-required licenses for the operation of such business. Selected Contractor must meet the following criteria to qualify as an Independent Contractor under all applicable federal and state laws.

Three or more of the following:

- The undersigned business is a properly registered (and licensed, if applicable) business providing the services that will be provided to Worksystems Inc. This means the business (whether an LLC, Corporation or Sole Proprietorship) is registered with the Oregon Secretary of State (or the state where your business is located if other than Oregon) and has satisfied any applicable local business registration requirements.
- The business has the necessary staff, tools and equipment needed to perform the services;
- The business bears risk of loss related to the services to be performed, as demonstrated by one or more of the following: (A) this will be a fixed price contract; (B) defective work will be corrected by the business at no additional charge; and/or (C) warranty the services provided;
- The business maintains its own liability insurance, and all required insurance associated with the provision of services, including without limitation workers compensation insurance for all personnel, unless they are exempt (for example, owners);
- The business provides contracted services for two or more different persons, organizations, and or companies within a 12-month period, or routinely engages in business advertising, solicitation or other marketing efforts reasonably calculated to obtain new contracts to provide similar services;

OR

- Any personnel performing the services are either owners or employees, and exercises exclusive control over the work performed by its personnel;

AND

- The services will be primarily performed from an independent business location: (A) that is separate from the business or work location of Worksystems; or (B) that is in a portion of Contractor residence and that portion is used primarily for the business.

AND

- The business otherwise qualifies as an Independent Contractor under all applicable federal and state laws.

System for Award Management (SAM) Requirements (Does not apply to individuals)

Worksystems cannot enter into Contract negotiations with an organization that is not legally established to conduct business within the State of Oregon or debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

Organizations that have active exclusion records on their Unique Entity Identifier number in the SAM at www.sam.gov may not be awarded a Contract.

- Selected Contractor must maintain an active SAM registration with current information, including information on immediate and highest-level owner and subsidiaries, as well as on all predecessors that have been awarded a Federally funded contract or grant within the last three years, if applicable, at all times during which it has an active Federal award or an application or plan under consideration by a Federal awarding agency or pass-through entity.
- Selected Contractor must represent and warrant that it is not, nor has been, debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency. Additionally, selected CONTRACTOR must attest it has no knowledge of any proposed actions against it for its debarment, suspension, proposed debarment, declaration of ineligibility, or voluntary exclusion from participation in this transaction by any federal department or agency.
- Selected Contractor must represent and warrant that it does not have an active exclusion record on its Unique Entity Identifier Number in SAM at www.sam.gov.

Part V: Scope of Work

Selected Contractor must oversee and manage Worksystems' IT needs, onboarding and offboarding networking equipment, provide support, and train the Worksystems' *IT Helpdesk Technician* when there is turnover in the position. Selected Contractor must provide high-level technical support and must be available within three to four hours (maximum) for system outages that affect business operations. The work will vary by week. Selected Contractor must respond to IT support tickets timely depending on the severity of the ticket. More severe tickets must be prioritized and resolved or have a communicated plan for resolution within one business day. Hours vary and depend on business need.

Selected Contractor must provide on-demand small business IT solutions, including but not limited to the following:

- IT systems administration and support.
- Network and firewall management, support, and documentation.
- 24 x 7 network system monitoring.
- Patch management (service packs, critical updates, version updates).
- Cyber Security Services.
- Microsoft Server technology solutions and support.
- Microsoft Office 365 solutions and support.
- Vendor management and support (internet, phone, accounting, printer/copier, and other 3rd party vendors).
- Training Worksystems' *IT Helpdesk Technician* to provide Tier 1 level support for Worksystems staff.
- Tier 2+ level support for Worksystems staff.
- Primary/full-service support (Tier 1+ level support) for WorkSource Portland Metro Center's servers, desktops, and printers described above in [Part II: Background](#).
- Primary/full-service support (Tier 1+ level support) for the Colocation environment described above in [Part II: Background](#).
- Maintain systems documentation, inventory, and equipment upgrade schedules.
- Source, acquire approval, and assist with purchases of hardware, software, and equipment that is needed.
- Manage software licenses.
- Develop a data recovery plan.

- IT strategy planning (budgetary planning and assist with Worksystems office move).
- Other project consulting and implementation as needed.

Part VI: Proposal Narrative Content and Evaluation Criteria

Proposals should be no longer than 10 pages, single sided, with a preferred font size of 12 point for the main text. Page limitation excludes Proposal Cover Sheet, the Administrative Capacity Checklist and response documents, Resumes, References and the Budget.

Section A: Scope of Work

(15 points)

Submissions must propose a plan for providing the services and support described above in [Part IV: Contractor Qualifications and Requirements](#) and [Part V: Scope of Work](#). Proposals must discuss or describe the following:

- a) Protocols related to working with confidential information, Personally Identifiable Information, and client proprietary information.
- b) Experience providing on-demand small business IT solutions and support including Tier 1+ and 2+ level support.
- c) Response protocols and resolution times, and escalation protocols.

Section A: Evaluation Criteria

- Proposal narrative includes a description of protocols related to working with confidential information, Personally Identifiable Information, and client proprietary information.
- Description of experience meets [Part IV: Contractor Qualifications and Requirements](#) and [Part V: Scope of Work](#) requirements.
- Proposal narrative includes a description of response and resolution times and escalation protocols.

Section B: Management and Staffing

(20 points)

- a) Describe the roles of staff on your team who will be implementing the IT services. Include FTE you anticipate and key duties for each person.
- b) Describe staff experience in current, legacy, and emerging operating systems (multi-platform); environments and network protocols; router configurations; internet applications; and data security.
- c) Submit resumes for key personnel likely to be working with Worksystems, or job descriptions for personnel that would be assigned to Worksystems.
- d) Describe your approach to upgrading your staff skills to meet changing conditions and assuring that staff assigned to Worksystems have the specific skill-based competencies pertinent to providing relevant network support and system monitoring, and troubleshooting.

Section B: Evaluation Criteria

- Discussion of staffing clearly describes program oversight and staff responsibilities. Staffing is sufficient to support all required IT services.

- Staff experience clearly aligns with the IT services proposed.
- Discussion of the approach to upgrading staff skills illustrates a strong plan to meet changing IT conditions.
- Resumes or job descriptions strongly show evidence of key personnel’s knowledge and expertise of current, legacy, and emerging operating systems (multi-platform); environments and network protocols; router configurations; internet applications; and data security.

Section C: Budget

(20 points)

A completed budget must be included in the response. Provide and describe the fee structure for the services described in [Part V: Scope of Work](#).

- Identify short-term, up-front, and one-time only costs.
- Identify long-term and ongoing costs.
- Provide a projected total annual cost.

Funding Restrictions

Equipment or capital expenditures may not be purchased with funds for this project.

Section C: Evaluation Criteria

- Costs are reasonable and staffing costs align with the services described.
- Budgeted costs are consistent with the proposed services and is sufficient to perform the tasks described in the Proposal Narrative.
- Budget is sufficiently detailed and demonstrates how cost estimates were derived including quantities and unit costs.
- Demonstrates fiscal responsibility and reasonableness.

Part VII: Proposal Review Process

Proposals and respondent presentations will be evaluated by a committee of representatives from Worksystems and selected system network experts. The review committee’s recommendation will be provided to Worksystems’ Chief Operations Officer who will make the final decision.

Part VIII: Proposal Submission

Worksystems must receive the proposal and all related documents marked “(Name of Applicant) IT Services and Support” ***no later than Monday, September 9, 2004 at 12:00 noon***. The Proposal Cover Sheet must be signed by an individual authorized to represent the organization, to act on its behalf and to legally bind it in all matters related to the Request for Proposals. Submissions are to be submitted electronically.

Please submit the electronic copy of the proposal in PDF format to rfp@worksystems.org. Worksystems will send an email confirmation to the address on the Proposal Submission Cover Sheet to acknowledge receipt.

Complete proposal packages will include the following documents:

Proposal Documents	Format
Completed and signed Proposal Submission Cover Sheet	PDF
Proposal Narrative	PDF
Resumes for key personnel likely to be working with Worksystems, or job descriptions for personnel that would be assigned to Worksystems.	PDF
Two references for whom the organization has provided the same or similar work. Include the organization name, project identification, contact name, email address and phone number.	PDF
Budget	PDF

It is the respondent’s responsibility to ensure the submission was received. If a Worksystems confirmation email has not been received, it is the respondent’s responsibility to follow-up with another email or telephone call before 12:00 noon on Monday, September 9, 2024. Proposals received after noon PST on September 9, 2035 will not be considered.

Part IX: Award Notification

Provisional award results will be sent via e-mail by September 25, 2024.

Part X: Administrative Detail

Inquiries

All questions related to this solicitation are to be submitted electronically via email with the subject “IT Services and Support” and sent to: rfp@worksystems.org. Questions received after the solicitation has been published and before close of business September 3, 2024 will be responded to within three business days by posting in the “Questions and Answers” section for this Request for Proposals at www.worksystems.org in the News and Events section. Questions received after September 3, 2024 will not be answered.

Withdrawal

A submitted Request for Proposals response may be withdrawn at any time. A written request to withdraw the response must be submitted electronically to rfp@worksystems.org.

Appeals

The following process has been established to address appeals:

- The appeal must be due to what the respondent considers a flaw in the Evaluation Committee’s funding recommendation process. The appeal must be based on a violation of the process established for the solicitation.
- The appeal must be submitted in writing by September 30, 2024. Appeals must be sent to rfp@worksystems.org. All appeals are public information.
- The organization or individual filing the appeal must specify the basis of the appeal and provide an alternative the appellant would find acceptable. Proposal rating scores may not be appealed. The fact that a proposal was not recommended for funding is also not open to an appeal, nor is a complaint about the amount of funding granted.

During any part of the review or consideration, the appellant may be asked to clarify or amplify statements or to provide proof of claims or other statements. Any such requests must be fully responded to within the time designated by Worksystems. In the event an appellant fails to respond, the appeal will be dismissed, and no further appeal will be accepted.

Worksystems’ Executive Director and Chief Operating Officer will review the appeal and issue a written response that is intended as a complete and final answer to the appeal.

Resource Documents

Resource documents for this Request for Proposals as posted on Worksystems’ website with this Solicitation.

- Proposal Submission Cover Sheet
- Sample Professional Services Agreement
- Independent Contractor Qualifications document

Part XI: Additional Provisions and Disclaimers

- Worksystems reserves the right to waive informalities and minor irregularities in offers received.
- This Request for Proposals does not commit Worksystems to award a contract.
- Worksystems may accept any item or group of items of any offer, unless the bidder qualified its offer by specific limitations.
- Worksystems reserves the right to request additional data or oral discussion or documentation in support of written offers.
- By providing contact information for references respondents are authorizing Worksystems to contact the reference and discuss respondents' work.
- No costs will be paid to cover the expense of preparing a proposal.
- All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to Worksystems and be subject to disclosure under the Freedom of Information Act. Applicants are advised that most documents in the possession of Worksystems are considered public records and subject to disclosure under the State of Oregon's Public Records Law.
- Formal notification to award a contract and the actual execution of a contract are subject to the following: Receipt of anticipated funding, results of negotiations between selected respondents and Worksystems staff, and continued availability of funds.
- Any changes to the funding level or board direction may result in a change in contracting. In such instances, Worksystems will not be held liable for what is in the bidder's proposal or this Request for Proposals package.
- Worksystems may decide not to fund part or all of a proposal even though it is found to be in the competitive range if, in the opinion of Worksystems, the services proposed are not needed, or the costs are higher than Worksystems finds reasonable in relation to the overall funds available, or if past management concerns lead Worksystems to believe that the bidder has undertaken more services than it can successfully provide.
- Worksystems has a right to fund a lower-ranked proposal over a higher ranked proposal because of valid policy considerations, including but not limited to, geographical considerations, leveraging of outside resources, and target populations.
- Worksystems reserves the right to determine both the number and the funding levels of contracts finally awarded. Such a determination will depend upon overall fund availability and other factors arising during the proposal review process. The proposal warrants that the costs quoted for services in response to the Request for Proposals are not in excess of those that would be charged to any other individual for the same services performed by the bidder.