

## Request for Proposal



### **Request for Proposal for IT Services**

**RFP Number: CRDF-IT0418**

Date of Issue: May 8, 2018

Closing: May 25, 2018

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# 1.0 Overview

## 1.1 About CRDF Global

Founded in 1995, CRDF Global is an independent nonprofit organization that promotes international scientific and technical collaboration through grants, technical resources, training, and services. Based in Arlington, Virginia with offices in the Eurasia and MENA regions, CRDF Global works with more than 40 countries in the Middle East, North Africa, Eurasia, and Asia. We specialize in bringing isolated scientific communities into the scientific mainstream through a variety of science engagement and capacity-building programs. CRDF Global encourages science cooperation between countries where official relations are strained.

CRDF Global believes that the world's scientists and innovators must work together to help solve today's global challenges in such areas as global health; nuclear, biological and chemical security, and water, food, energy nexus. Through collaboration, scientists and innovators also enhance international understanding that can help to improve relations between countries. Our distinction lies in our ability to offer programs that empower grantees at every stage of science and tech innovation combined with our deep understanding of international grant and financial management processes.

CRDF Global is as a 501-3c non-profit organization.

## 1.2 CRDF Global's Vision and Mission

### Our Vision

Our world healthy, safe, and sustainable

### Our Mission

Promoting safety, security, and sustainability through science and innovation

### Core Values

- **Collaboration:** Underpinning everything that we do is the belief that shared knowledge, practices, and ideas are necessary to address the world's most pressing issues.
- **Innovation:** We think differently. Our best work is achieved by seeking new approaches and delivering successful and long-lasting solutions.
- **Dedication:** Yesterday, today, and tomorrow – we are committed to promoting safety, security, and sustainability through science and innovation and will pursue the right opportunities to ensure that our mission is achieved.
- **Integrity:** We are proud to operate under the highest ethical standards and to nurture an organizational culture of transparency, accuracy, and respect.
- **Excellence:** We are driven by a commitment to do great work with a desire to exceed the expectations of our community.

## 1.3 Information Technology Organization Model

Currently CRDF Global has an IT staff of three full time employees an IT Director and two software developers, who provide overarching support for the internal IT Systems and support processes. All IT staff are located in the Arlington, Virginia main office. CRDF Global currently has some systems hosted internally including their organizations financial solution, which is DelTek and CostPoint. One additional core internal application is Watson which is a custom build PowerBuilder and Microsoft SQL Server database. The application is used for operational aspects of the business that several teams utilize.

CRDF Global currently uses Microsoft Office 365, SharePoint Online and Skype for their business tools.

## 1.4 Objectives of this RFP

The purpose of this Request for Proposal (RFP) is to invite prospective vendors to submit a response for general IT professional services, Cyber Security and IT Training services related to but not limited to the following capabilities:

- Microsoft Dynamics 365
- Microsoft SharePoint Online
- IT Managed Services Service Desk / IT Operations
- Cyber Security & Compliance Services
- Business Intelligence & Data Services
- IT User Training Services

This RFP will provide the applicable vendors with the relevant insights into the organizations current state and the future direction the organization is planning to head.

CRDF Global would like each vendor to provide a detailed approach and pricing for each of the requested task orders outlined in Section 8.0 of this RFP.

## 1.5 RFP Process and Timelines

The RFP process begins with the issuance of this RFP, which will inform potential vendors of CRDF Global's objectives and may conclude with the selection of an IT Partner. The timeline of events are specified in section 3.8.

## 2.0 RFP Process and Conditions

### 2.1 Structure of this Document

This document consists of core areas detailed below.

**Section 1 Overview:** This section provides a brief overview of the RFP.

**Section 2 RFP Process and Conditions:** This section outlines the RFP and contains terms and conditions.

**Section 3 Vendor Evaluation Process:** This section explains the evaluation criteria and contains instructions to respondents on the RFP response process.

**Section 4 Organization's Background:** This section contains background information about CRDF Global.

**Section 5 Technical Environment:** This section contains the current technical overview of the CRDF Global's administrative systems.

**Section 6 Interested Service Areas:** This section contains an overview of the products and services that CRDF Global is interested in pursuing via this RFP.

**Section 7 Response Requirements:** This section contains details about where and how respondents should submit their response.

### 2.2 Terms and Conditions of the Proposal

**RFP Ownership:** All responses to this RFP will become the property of CRDF Global and will not be returned. If you have any questions about disclosure of the records, you submit with your informational material, please contact the RFP Coordinator.

### 3.0 Vendor Evaluation Process

The evaluation process of vendors will walk thru a six-stage process, as following:

- a. Phase 1 – Review of RFP Responses
- b. Phase 2 – Scoring & Consolidation
- c. Phase 3 – Vendor Presentations
- d. Phase 4 – Presentation Scoring
- e. Phase 5 – Vendor selection and Award
- f. Phase 6 – Reference checks & Site visit

#### Vendor Questions and/or Inquiries

CRDF Global shall provide all questions and answers of general interest to all vendors solicited by written addendum up until May 17, 2018. Questions that arise after the vendor question deadline of May 17<sup>th</sup> will not receive a response. CRDF Global must ensure that fair and consistent practices are followed and consistency maintained for all respondents.

Note: CRDF Global is under no obligation will not answer any hypothetical or speculative "what if" questions.

### 3.1 Services & Solutions

In addition to submitting a fully conforming response with the necessary requirements and task order responses, vendors are encouraged to demonstrate innovation through unique abilities, features, functions, or services. CRDF Global would like to have an understanding of each vendors full capabilities beyond those described in section 6.0.

### 3.2 Phase 1 – Review of RFP Responses

All proposals will be reviewed in detail taking into consideration all service areas each vendor has to offer and how those align with the needs outlined in section 6.0. Responses deemed to meet a sufficient number of service areas, experience, past performance and cost considerations will proceed on to Phase 2 Scoring and Consolidation of the most qualified vendors.

### 3.2 Phase 2 – Scoring of RFP Responses & Consolidation

Scoring Section	Max Score
About the Vendor	4
Understanding of the Service Needs	1
Project Service Management and Methodology	4
Vendor Qualifications	2
Quality of response to meet the objectives and task orders outlined	5
Professional Certifications (staff members)	4
Task Order 1 – Vulnerability Scan	5
Task Order 2 – Service Desk Tier 1 & 2	20
Task Order 3 – MS Dynamics	20
<b>Total</b>	<b>65</b>

To provide context for the Project Service Management and Methodology scoring, CRDF Global would like to know the vendors selected approach (e.g. COBIT, CMM, ITIL...).

For vendor qualifications please specify any industry specific organizational levels or awards achieved within the last 12 months (e.g. Microsoft Dynamics Certified Partner, Citrix Platinum Partner, etc...)

All responses will be reviewed in their entirety for demonstrated experience; breadth of services, past performance relative to the task orders outlined in section 8.0 and associated costs. The top three (3) responses deemed to meet the objectives, expectations and cost considerations will move to Phase 3 Vendor Presentations.

### 3.3 Phase 3 – Vendor Presentations

Phase 3 of the evaluation process will involve interacting with the three (3) top selected vendors to enable CRDF Global to gain additional understanding regarding each vendor’s response.

The vendor presentations will be held at CRDF Global’s main office which is located at 1776 Wilson Boulevard, Suite 300 Arlington Virginia 22209. CRDF Global will not, in any way, be responsible for any vendor cost incurred. The presentation agenda and content will be at the discretion of the vendor, but are expected to include details of the vendor’s proposed services, past performance and details related to the Task Orders outlined in section 8.0. Along with any additional relevant experience that may benefit the information technology needs of CRDF Global. Vendors will be allotted 90 minutes (1.5 hours) for their presentation.

There should be a question & answer session scheduled at the end of the vendor’s presentation. The vendor should use its discretion as to which of its representatives attend the presentation; however, CRDF Global requires that key implementation project and service team members will be physically present at this meeting. Further, the proposed technical lead should be physically present at the vendor presentation, unless extreme and unforeseen circumstances of a personal nature affecting that individual make his or her physical presence impossible. Vendors are not expected or permitted to provide information about the pricing deliverables in the course of any such presentation.

#### Past Performance

Demonstrate a proven record of accomplishment for success in services and projects similar to the services and projects with organizations like CRDF Global. Vendor should provide a detailed description of past performance correlative to each of the three task orders outlined in section 8.0 with client’s who are similar in size and scope to CRDF Global.

The presentation should include:

- Presentations from the vendor highlighting the key advantages of their services and/or products; which presentations will be conducted, and the terms and manner of the presentations are set forth in the section below.
- Vendors should provide past performance experience relevant to the size and scope of each task order outlined in section 8.0.

Once the presentations are complete, points will be awarded to each response. The score breakdown for Phase 3 will be as follows:

### 3.4 Phase 4 – Presentation Scoring

In Phase 4 of the response evaluation process, each vendor’s response and presentation will be reviewed by the Evaluation Committee and scored accordingly. The weighting of the scoring of each section will be as follows:

Section	Max Score
Vendor Presentation	20
Overall Proposed Pricing	10
Professional Services Rate Card	5
<b>Total</b>	<b>35</b>

### 3.5 Phase 5 – Vendor Selection and Award

After the presentations and scoring has been tabulated, the Evaluation Committee will then make the final selection. Once approved by the CRDF Executive Team, the Executive Sponsor shall notify the selected vendor with a Notice of Vendor Selection and proceed with preparing a Contract and Services Agreement contingent upon completion of the vendor past performance checks and site visit.

## 3.6 Phase 6 – Past Performance Checks & Site visit

### Past Performance Checks and Other Verifications

Vendors will provide at a minimum three past performance references relative to each of the task orders outlined in section 8.0. CRDF Global reserves the right to check references other than those provided by any vendor, and to verify with any vendor or with any third party any information set out in a vendor's proposal. CRDF Global may contact the past performance references and others to confirm the details of the represented services or products similar to the deliverables contemplated by this RFP.

Although no specific points are assigned to past performance, information provided by vendor and other persons may be used by CRDF Global to gain insight in connection with the evaluation process to be carried out by CRDF Global as part of process for assessing the credibility of the proposals to which they relate. At CRDF Global's sole discretion, CRDF Global may decide to shortlist the number of vendors after Phases 1 and 2, with the low-scoring vendors simply disqualified from further consideration.

Past Performance Reference should include:

- Client name and address
- Client point of contact name
  - o Business phone number
  - o Business email address
- Services/projects provided to client relative to task orders outlined in section 8.0
  - o Dates of services/projects

### Respondent Site Visit

An on-site visit of the selected vendor site will be required. The purpose is to verify facts presented in the proposal, whether stated in the RFP or not. After the conduction of the on-site visit, the respondent visited may be re-evaluated based on the evaluation criteria and process by the Evaluation Committee.

## 3.6 Other Evaluation Considerations

At any stage during the evaluation process, CRDF Global may:

- Request further clarification on any aspect of the vendor's response.
- Request a vendor to supply additional information to support its response.
- Complete a statement of requirements supplementary to this RFP because of matters raised by the evaluation or subsequent past performance reference checks.
- Exclude any responses which CRDF Global determines in its discretion to be incomplete.

## 3.7 Timetable

The RFP process timetable is as follows all times in Eastern time-zone:

<b>Event</b>	<b>Date</b>
RFP Issue Date	May 8, 2018
Vendors Conference Call	May 14, 2018 at 2:30 p.m.
Deadline for Vendor Questions	May 17, 2018 at 5:00 p.m.
RFP Submission Deadline	May 25, 2018 at 5:00 p.m.
Vendor Shortlist Announcement	June 8, 2018
Vendor Presentations	June 19th & 21st, 2018
Vendor Past Performance Reference Checks	June 26, 2018
Selection of Vendor	July 9, 2018

Note: CRDF Global intends to adhere to this timetable but realizes that delays may occur. CRDF Global reserves the right to amend any of the dates set forth above. The vendor must be able to accommodate changes to the schedule.

Vendor Conference Call Details: (218) 339-7800 Participant Pin: 920-4779

Vendor Questions should be directed to: [tjennings@crdfglobal.org](mailto:tjennings@crdfglobal.org)

### 3.8 Form of Submission

Vendor *must* submit their response electronically via e-mail to [RFPIT0418@crdfglobal.org](mailto:RFPIT0418@crdfglobal.org) .

- Submission – SERVICES , TECHNICAL RESPONSE and FINANCIAL PROPOSAL
  - The services, technical and financial response shall contain the detailed services pricing, specific product pricing and professional services rate card.

When submitting their response, the vendor should include:

- a. An **electronic version (submitted via e-mail)** in a Microsoft Word, Microsoft PowerPoint, Microsoft Project and/or Microsoft Excel, or searchable PDF format of the entire response making up the “Original” of the vendor’s response.

Responses must be written in English.

Each vendor is solely responsible for ensuring that their response is acknowledged and confirmed. Responses that are sent to the address ([RFPIT0418@crdfglobal.org](mailto:RFPIT0418@crdfglobal.org)). Will receive an email confirmation upon receipt.

**The vendor’s response(s) must be received electronically by CRDF Global at or before the response Submission Deadline.** Receipt of each response will be confirmed by CRDF Global at the above e-mail address only. CRDF Global is not responsible for any submission received after the stated response Submission Deadline, and will not consider any such submission.

Any response not received at the e-mail address specified above or before the response Submission Deadline will be will not be considered.

## 4.0 CRDF Global Background Details

### 4.1 Project Overview

The objective of this request for proposal (RFP) from CRDF Global is to identify a technology solutions provider that can help become the organizations technology partner for the organizations IT needs. As part of this RFP we are interesting in learning about each vendors complete capabilities. CRDF Global is looking to streamline the number of technology vendors we interact with.

### 4.2 Objectives

The objective of this RFP is to identify a local technology solutions provider who can provide a breath of IT professional services and cyber security services to the organization. It is the intent of CRDF Global to identify one leading partner from which the organization will procure IT products and services, where applicable.

### 4.3 Core Values

**Collaboration:** Underpinning everything that we do is the belief that shared knowledge, practices, and ideas are necessary to address the world’s most pressing issues.

**Innovation:** We think differently. Our best work is achieved by seeking new approaches and delivering successful and long-lasting solutions.

**Dedication:** Yesterday, today, and tomorrow – we are committed to promoting safety, security, and sustainability through science and innovation and will pursue the right opportunities to ensure that our mission is achieved.

**Integrity:** We are proud to operate under the highest ethical standards and to nurture an organizational culture of transparency, accuracy, and respect.

**Excellence:** We are driven by a commitment to do great work with a desire to exceed the expectations of our community.



## 5.0 Technical Environment

### 5.1 Current State

**Data Center** – Currently CRDF Global is running an in-house server room for the internal custom built applications and the finance solution. The servers are running a variation of Microsoft Server operating system 2008 or newer.

**Wide Area Network (WAN)**– Currently the organization has one primary office location with a few distributed staff within the continental us and globally. The remote users access network resources thru the use of VPN or Microsoft Terminal Services.

Updates to the computing environment both desktop and server are managed thru Microsoft Update Services. There is not currently any end point monitoring in place

**Desktops** – The computing environment is primarily a mix of Microsoft Windows 7 and Window 10 computers. With a few Macintosh (MAC) devices within the organization. The majority of the laptops and tablet type devices have Bitlocker enable for security and Symantec end point protection.

**Applications** – As mentioned previously there are a few internal applications

- Watson – Which is a custom Powerbuilder, SQL Server application that managed operations, projects, grants a few other areas of the organization operationally
- DelTek / Costpoint– Is the financial platform for CRDF Global and is an on premise platform.
- Office 365 –The organization is currently using Microsoft O365 for Email and SharePoint online services within the O365 suite
- Salesforce – Is the organizations current contact relationship management (CRM) solution
- Website – The organizations website is currently being hosted and managed within a Drupal CMS system.

### 5.2 The Future of CRDF Global's Technology

CRDF Global has been going thru both a process improvement exercise operationally and the development of a technology roadmap. What has come out of both of these exercises is the organization is positioned very well to adopt new cloud based and mobile technologies that will streamline operational processes, improve staff collaboration and engaged external constitutes in a more delightful experience.

The organization has chosen to consolidate and migrate its technology solution stack towards the Microsoft ecosystem of tools and products. This was driven out of many considerations though two primary ones were industry supportability and costs. As such when looking towards a new technology partner those with an emphasis within the Microsoft ecosystem will, more appropriately align with the organizations technology direction.

The organization is in the process of gathering requirements related to many of the operational areas. Those in the most immediate future are:

- Travel and Events
- Cyber Security & Compliance
- Staff Collaboration Tools
- Project Management

For an organizational platform there is a strong emphasis to build the foundation on the combination of Microsoft Dynamics 365 platform and Microsoft SharePoint Online solutions.

## 6.0 Interested Service Areas

The purpose of this RFP is to identify information technology partners with a board set of services related to both general Information Technology and Cyber Security. This will enable CRDF Global to review firms that can provide the services and products needed not just today but in the future. With the end goal selecting a primary partner, that CRDF Global can build a strong relationship with moving forward. In order to accomplish this successfully, a detailed

understanding of the vendors set of services, methodology, history and future direction is required and must be clearly articulated by the vendor. These include:

- Overview of IT Services provided
- Details on any specific specialty areas
- Background on organization
  - History of the organization
  - Number of full time staff, contractors and locations
  - Certifications (Organizational and Employee)
- IT Operational Services
  - Service Desk
  - Network Management Monitoring
- Cyber Security & Compliance Services
  - Professional Services
  - Monitoring Services
  - Preferred toolset(s)
- Technology Training Services
- Microsoft Dynamics & SharePoint Services
- Professional services rate card (onsite/offsite)
- Vendors Process & Methodology for projects

## **7.0 Pricing**

### **7.1 Response Requirements**

CRDF Global may decide to purchase services or products from the selected vendor. Cost information about the services proposed to be provided by the vendor should clearly outlined in a professional services rate card. CRDF Global would like to see if applicable on-site and off-site rates.

### **7.2 General Pricing Requirements**

If the vendor becomes the selected IT partner, CRDF Global expects that the pricing set out in the vendor's response will remain valid during the Timeframe for Negotiations and continuing until the execution of a Services Agreement. Vendors are advised that any request for modifications to the pricing made by the vendor during this period may constitute a withdrawal by the vendor of its response.

Respondents must describe in detail all of their assumptions in developing CRDF Global's pricing and the impact on pricing if assumptions are not valid. The inclusion of any assumptions, constraints, or caveats as part of the vendor's pricing may result in the disqualification of a response or a lower number of points being awarded to the vendor's response.

### **7.3 Currency**

All pricing is to be quoted in U.S. Dollars. All transactions will be conducted in U.S. Dollars.

## **8.0 Response Task Orders**

It is the expectation of CRDF Global that each vendor's response for the below Task Orders would include the following:

- Specific relevant past performance
- High level project plan timeline
- Estimated labor costs and any associated software or product costs

## **Task Order 1- Cyber Security Vulnerability Scan**

The scope of Task Order 1 is for the completion of a Cyber Security Vulnerability Assessment to identify any vulnerabilities related to CRDF Global's external and internal network infrastructure. The assessment should have an emphasis on PCI and PII data, DFARS, and a basic gap analysis.

The level of effort for each vendor should be based on:

- 10 external IP Addresses
- 100 Internal assets
- 1 physical network location

## **Task Order 2- Service Desk Tier 1 & 2**

The scope of Task Order 2 is for the vendor to provide service details; pricing, methodology and options for outsource Service Desk services for Tier 1 and Tier 2 support. Pricing should be based on 24/7/365 support.

Vendor should clearly articulate and describe the following in their response:

- Ticket workflow and notification options for Tier 2 to Tier 3 (CRDF Global IT) escalation.
- Timeline and approach to transition service desk support.
- Monitoring services
- Service Level Agreement details
- Reporting

**Tier 1** - Support for basic customer issues such as solving computer, email, MS Office issues and fulfilling service desk requests that need IT involvement. If no solution is available, Tier 1 personnel escalate incidents to a higher tier. Expectation is that Tier 1 personnel that will be supporting CRDF Global have a minimum 1-year of relevant experience.

**Tier 2** - Experienced and knowledgeable technicians assess issues and provide solutions for problems that cannot be handed by Tier 1. If no solution is available, Tier 2 support escalates the incident to Tier 3 which will be the CRDF internal staff. Expectation is that Tier 2 personnel that will be supporting CRDF Global have a minimum 3-years relevant experience.

Pricing Considerations:

- 10-15 remote staff members
- 80 total staff members
- Microsoft Office 365 e-Mail
- Windows 7 & 10 operating systems

## **Task Order 3- Microsoft Dynamics CRM**

The scope of Task Order 3 is for the vendor to provide service details, pricing, methodology and options for configuration, setup, implementation and training for Microsoft Dynamics 365 CRM.

Pricing Considerations:

- 30 initial staff members to grow towards 80 staff members in future phases
- Assume all organizations and contact data only will be migrated from Salesforce to MS Dynamics 365
- End User Training provided to initial staff members