

Request for Proposals for an Outsourced Chief Technology Consultant and IT Systems Support

I. INTRODUCTION

Deaconess Foundation is currently soliciting proposals from qualified individuals, firms, or teams to serve as an outsourced chief technology consultant and provide comprehensive ongoing IT support services for the Deaconess Foundation and the Deaconess Center for Child Well-Being. It is the Foundation's desire to optimize these functions so that Deaconess staff can continue to focus on the Foundation's mission. Prospective individuals, firms, or teams should be able to demonstrate knowledge of best practices in technology for nonprofits to enhance relationships with stakeholders, improve efficiency and productivity, and data security.

II. SCOPE OF SERVICES

1. Outsourced Chief Technology Consultant:

- Develop and maintain a comprehensive IT strategy and system roadmap that aligns with the organization's goals.
- Make sure that the Foundation's and the Center's technology platforms are positioned to support the Foundation's strategy and mission.
- Leverage technology to enhance relationships with stakeholders.
- Identify opportunities to optimize productivity and reduce costs.
- Recommend IT budget to maintain current systems and implement/upgrade solutions.
- Develop and implement a formalized hardware lifecycle management process.
- Recommend and implement best practices and policies for data and system security.
- Position the Foundation's technology platforms for the long-term.
- Recommend or provide appropriate training as necessary.
- Maintain up-to-date documentation on all production systems, applications, and processes to reduce single points of failure.

2. Ongoing IT Support:

- Maintain and support internet services for the Deaconess Center for Child Well-Being and its campus.
- Maintain and support video conferencing and audio-visual components for the Deaconess Center for Child Well-Being.
- Maintain and support Deaconess Center's security system and network, includes wireless network.
- Maintain wireless network for Deaconess Foundation and Deaconess Center.
- Maintain and support mobile devices and remote workplaces.
- Order and install equipment as needed.
- Provide help desk support
- Support technology needs for outsourced accountants in support of Deaconess' work.
- Support VoIP phone system.

III. BACKGROUND OF ORGANIZATIONS

Deaconess Foundation

Deaconess Foundation invests in the well-being of children, engages our region around the plight of youth, and advocates for change. A ministry of the United Church of Christ, Deaconess has invested more than \$80 million to improve the health of the St. Louis community since 1998 and believes healthy, hope-filled futures for children benefit the entire region. The Foundation's grantmaking footprint includes St. Louis City, St. Louis, Jefferson, St. Charles, and Franklin Counties in Missouri and Madison, St. Clair and Monroe Counties in Illinois.

Deaconess Foundation operates as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and as a Type I supporting organization under Section 509(a)(3) of the Code. Deaconess Foundation is a supporting organization of the Missouri Mid-South and Illinois South Conferences of the United Church of Christ.

Additional information about the Foundation can be found on our website: www.deaconess.org.

Deaconess Center for Child Well-Being

Established by Deaconess Foundation, Deaconess Center for Child Well-Being is a community action tank. Its mission is to build power to advance child well-being in the St. Louis region by strengthening alliances for child-friendly public policy, increasing citizen contact with policy makers, positioning youth and organizers to move systems and engaging faith communities in child advocacy.

Deaconess Center is a qualified low-income community business (QALICB) under new market tax credit guidelines. It operates as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and as a supporting organization under Section 509(a)(3) of the Code. Additional information about the Center can be found on our website: www.deaconesscenter.org.

IV. OTHER PROPOSAL INFORMATION

Outsourced History. Although the Foundation has outsourced its accounting, payroll, human resources, information technology and administrative services with different vendors for the last 20 years, the Foundation believes that it is a good business practice and good stewardship to periodically seek proposals for these services. Furthermore, the Foundation is seeking greater integration and efficiencies with its back office support. Over the last few years, Deaconess has bid out many of its support functions such as investment management, auditing, and accounting.

Existing Platforms and Software: The Foundation currently uses an on-premise system with its data backed up by Microsoft. The Foundation uses the following software platforms:

- Office 365
- Financial Edge 7 Accounting Software
- Millennium Payroll Database

Deaconess has previously engaged a consultant to identify opportunities to improve our systems. To that end, Deaconess has signed a contract with Blackbaud to implement a CRM and Grantmaking platform in 2021. It is anticipated that the Foundation will upgrade the Accounting Software and Payroll systems in 2021, as well. The consultant also recommended that the Foundation move the Deaconess server and storage to the cloud for data and computing resiliency. The Foundation also desires to implement an enterprise project-management tool and a document management service.

Employees. Deaconess Foundation currently has 9 full-time employees. Additionally, Deaconess hires 17-23 part-time or seasonal employees throughout the year. Deaconess Center has no employees. All employees are currently working remotely because of the COVID-19 pandemic.

Change in Scope. If, it is determined by either party that a change in the scope of the work is necessary, the party shall promptly notify the other party in writing. The parties shall then determine whether the contract should be amended to provide for an adjustment in the scope of work performed and costs under the contract. In no event shall any payment be made for work beyond the scope of the original contract without prior written authorization for the additional work.

Access to Documents. Deaconess Foundation, Deaconess Center for Child Well-Being and their authorized representatives will have free and unrestricted access throughout the contract period and for three years after the contract ends to work papers, records and documents prepared or in process of being prepared under this contract.

Confidentiality. The outsourced chief technology consultant, its affiliates, and any subcontractors it may engage to assist with the support, agrees to keep information related to Deaconess Foundation, Deaconess Center for Child Well-Being, its finances, and its grants in strict confidence. Other than reports submitted to the Foundation, the contracted firm agrees not to publish, reproduce or otherwise divulge such information, in whole or in part, in any manner or form, or permit others to do so.

V. PROPOSAL CONTENT

Proposals should include the following information. Please provide the information in the order requested to facilitate our review of the qualifications of each firm. Please limit your proposal to a black and white Microsoft Word document of no more than 20 pages using 12-point Times New Roman font.

1. Name and Background – include complete name and contact information. If this is a collaborative effort with another firm or firms, or if any of the work is subcontracted to another party, please provide the same information for all consultants and indicate who will be the lead consultant.
2. Profile of Firm Proposing – provide a brief description of the size of the firm(s) and the composition of staff by level. Please include the racial/ethnic and gender demographics of the firm, and its leadership. Please note any regional or national resources available to the local team. Deaconess believes that diverse and inclusive teams lead to better outcomes. Describe your firm’s efforts to recruit, retain and support people of color.

3. Qualifications – describe the recent experience of your firm in working with comparable organizations: nonprofit, faith-based, grantmaking, and engaged in advocacy. Provide the names of organizations and contact information for 501(c)(3) organizations and foundations for whom you have worked within the past three years.
4. Understanding – statement of your understanding of the work to be performed.
5. Approach – describe your planned approach to the needs of Deaconess Foundation and Deaconess Center for Child Well-Being. The description should be adequate to demonstrate that you have knowledge of our activities and the related IT needs, including equipment, security, and platforms to help the Foundation achieve its goals. Describe your firm’s philosophy on telephony, responding to help desk requests, and security breaches. Please also indicate whether your staff will work remotely or on location, and the long-term continuity of staff assigned to the engagement.
6. Communication – please describe your firm’s philosophy on communications with Deaconess throughout the year. Please describe anticipated written and oral communications to Deaconess Management.
7. Key Personnel – please list those staff directly assigned to this project setting forth name, job title, duties and responsibilities and relevant experience/education/certifications. Please include the racial/ethnic and gender demographics of the team working on the account.
8. Conflict of Interest – describe any existing or potential relationships with board members or employees of the Deaconess Foundation that could affect your firm’s independence by creating an actual or perceived conflict of interest.
9. Budget and cost – Describe how you bill for services, your billing rates, and fees for the following services:
 - Outsourced chief technology consultant services.
 - On-Going Help Desk Support or Service Calls.
 - Cost to migrate from a physical server to a cloud-based server.
 - Cost of purchasing and installing a laptop computer.
10. References – offer at least three current references for similar engagements. Briefly describe the scope of your work for these references and a contact name and telephone/email for each one. (This information may be included with #3 above.)
11. Information on additional services – please provide any information on additional services that you believe would be pertinent, and aligns with Deaconess’ mission, vision and values.

VI. SELECTION CRITERIA

Proposals will be evaluated on the following criteria:

- Qualifications and experience of your firm and staff, particularly with not-for-profit organizations, and foundations.

- Understanding of the work to be performed and scope of services.
- Knowledge of best practices, latest standards, and innovative solutions
- Your firm’s alignment with Deaconess mission, vision and values, including racial equity.
- Personalized service
- Fees and billing structure

VII. PROPOSAL SUBMISSION AND DUE DATE

The proposals must be submitted in a Microsoft Word format via e-mail to Matt Oldani at the e-mail address listed below by **5:00 p.m. Central Time on March 12, 2021.**

Matt Oldani
Vice President, Strategic Alignment
1000 N. Vandeventer
St. Louis, MO 63113
(314) 436-8001
matto@deaconess.org

Questions regarding your submission may be directed to Matt Oldani at 314.436.8001 or via email at matto@deaconess.org. Please direct all inquiries to Matt Oldani only. Please do not contact any Board members or other employees. The failure to comply may result in disqualification.

PROPOSAL SELECTION TIMELINE

Deadlines and Selection Timing is as follows:

March 12, 2021	Deadline for submitting a proposal
March 19, 2021	Identification and Invitation for Interviews
March 22-26, 2021	Firm Presentations
March 31, 2021	Firm selected