



February 2, 2021

REQUEST FOR PROPOSAL

Remote Workflow Project

Spectrum Community Services (Spectrum) invites your participation in a Request for Proposal (RFP) process to provide an analysis of security and remote workflow needs at Spectrum in the immediate future.

The enclosed RFP defines the desired system evaluation services and outlines the requirements that must be met by entities submitting bids. Only one bid will be accepted from each entity. The successful bidder must agree to comply with the terms of the RFP, as well as the terms of the resulting contract.

Questions regarding this RFP should be directed, in writing, to Sanjay Choudhrie, Spectrum Community Services, at sanjay@spectrumcs.org

Time is of the essence in this process as the successful bidder must be able to begin service delivery upon notice of the award. The proposals are to be emailed to sanjay@spectrumcs.org or mailed to him at 2621 Barrington Court, Hayward CA 94545.

The final filing deadline for receiving proposals is the close of business, **March 1, 2020 by 5:00 p.m.** Postmarks will not be accepted as meeting this requirement and proposals received after this deadline will be rejected. Proposals which are submitted by fax machines will not be accepted. Please note that all decisions will be final, no exceptions.

Best regards,

Lara Calvert
Executive Director

Enclosure: IT RFP

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I. RFP TIMETABLE

February 3, 2021	RFP Sent Out to Bidders
February 16, 2021	Interested parties must submit a letter of interest to be registered to bid by this date.
March 1, 2021	Deadline for receipt of proposals
March 2 & 3, 2021	Proposals to be evaluated
March 8, 2021	Notification of Proposed Award All decisions are final on awards.
March 22, 2021	Projected start date of contract
May 28, 2021	Project completion date

II. REMOTE WORK FLOW ANALYSIS

Spectrum Community Services is requesting qualified entities to submit a proposal and quote to conduct a remote work flow analysis of the Low Income Home Energy Assistance Program (LIHEAP) systems at Spectrum. The needs analysis will include system recommendations pinpointing equipment and software upgrades to maintain an efficient, reliable, and functional system for communicating, tracking, reporting, and coordinating services.

Purpose of the information technology needs assessment:

Spectrum's planned infrastructure investments are intended to be designed to improve community access to services and information dissemination. These improvements will allow Spectrum to be more efficient in helping low income residents of Alameda County attain self-sufficiency, improve system efficiencies and ensure data security for protection of sensitive client and financial data. Specific information about deliverables can be found in Attachment A.

IV. GENERAL INFORMATION ABOUT THE RFP

A. Contract Amounts and Terms: The successful contractor will be expected to provide an information technology needs assessment as outlined in Section II and in Attachment A. These services are expected to commence immediately after signing a contract and to be completed no later than **May 28, 2021**.

B. Vendor Eligibility: This procurement is open to all qualified agencies, corporations, partnerships, associations, joint ventures and persons who respond in a timely manner to this RFP. At the time of the contract execution, the successful bidder must also be licensed to do business in the State of California (unless exempt from that requirement) and have adequate staff to deliver the services detailed in the contract. Services must include an on-site examination of the existing IT hardware and systems coupled at the various office locations with at least one face-to-face or ZOOM meeting at the beginning of the project, at least one mid-term ZOOM meeting and a ZOOM or face-to-face meeting at the completion of services.

C. Submission of a letter of Interest: All interested parties must submit a letter of interest to register to submit a bid by **Monday, February 16, 2021**. The bidder will then be qualified to

receive any RFP updates, if there are any, and answers to questions submitted by all bidders that may be received.

D. Proposal Submission

All proposals must be submitted in writing in a PDF document, utilize a size 12 font or larger, on standard 8 1/2 by 11 inches paper, single-spaced with each page clearly and consecutively numbered. The proposal should be as concise as possible, yet provide the required information. Please ensure that contact information is provided.

The proposal must be submitted in the legal business name of the bidder by an authorized representative. If the proposal is submitted by a corporation, the proposal must be signed by a corporate officer or by a representative authorized by the entity along with their contact information.

When submitting an original hard copy RFP submission with an original signature, please provide two (2) hard copies of the proposal enclosed in a sealed envelope or box bearing the name and address of the bidder clearly visible and plainly marked, "SEALED BID – PROPOSAL FOR INFORMATION TECHNOLOGY NEEDS ASSESSMENT." One (1) electronic copy is also required when submitting it by the due date.

Proposals not received by **5:00 p.m. on Tuesday, March 1, 2021** at the above address will be rejected. It is the responsibility of the bidder to insure that the proposal is submitted by the time and date, and to the address specified in the RFP. Postmarks will not be accepted as meeting the deadline. Facsimile (fax) copies will not be accepted.

All proposals become the property of Spectrum and will not be returned.

E. Amendments to the RFP: If revisions or additional data to the RFP become necessary, Spectrum will provide the information to all bidders that have submitted a letter of interest.

F. Evaluation Process: Proposals will be evaluated and scored by a panel consisting of Spectrum staff and such other persons designated by the Agency Executive Director. Proposals will be scored according to the criteria listed in Section IX, B, of this document.

G. Cost of Proposal: Costs for developing and submitting proposals are entirely the responsibility of the bidder and shall not be chargeable in any way to Spectrum.

H. Rejection of Proposals

Issuance of this RFP in no way constitutes a commitment by Spectrum to award a contract. The Agency reserves the right to reject any or all proposals received in response to this RFP, or to cancel the RFP if it is deemed to be in the best interest of Spectrum to do so.

Failure to furnish all information requested in this RFP or to follow the proposal format requested may disqualify the proposal. Any exceptions to the Scope of Work required by this RFP must be justified in the proposal. The evaluation panel will decide whether any exceptions are justified.

I. Proposal Confidentiality: All proposals shall remain confidential until the evaluation process is completed. After the evaluation process is completed, all proposals and score sheets shall be available upon written request. Proposals shall be available for review only at Spectrum Community Services, 2621 Barrington Court, CA 94545.

V. CONTRACT INFORMATION

A Recommendation for Award

The recommendation for award is contingent on successful negotiation of the contract and that the contractor meets all of the requirements set forth by SPECTRUM. The agreement is also contingent on the availability of sufficient funding.

B. Contract Term

The anticipated term of any resultant contract will be from approximately **March 22, 2021 through May 28, 2021**.

The successful bidder must agree to all terms and conditions of any resultant contract. The successful bidder will not be allowed to begin work under any successfully negotiated contract until such time as it has been approved by the Executive Director of Spectrum and the contract has been signed by both parties.

C. Governing Law

This bidding and any contract awarded hereunder will be governed by the laws of the State of California in addition to any other law cited herein.

All funds under this Agreement expended through a subcontract for personal services or goods shall be fully subject to open and free competition as directed by 2CFR200.320.

D. Nondiscrimination Requirement:

The bidder must understand and agree to adhere to the nondiscrimination clause contained in **ATTACHMENT C**. The bidder must also give written notice of this nondiscrimination requirement to all labor organizations with which they have a collective bargaining or other agreement, and shall include the nondiscrimination and compliance provision of this clause in all subcontracts to perform work under the contract.

E. Spectrum Technology and Electronic Communications Policy

The bidder must understand and agree to adhere to the SPECTRUM Technology and Electronic Communications Policy contained in **ATTACHMENT D**.

VI. TECHNICAL AND MANAGEMENT PROPOSALS: This section details information which must be included in all bids.

A. General Information: The successful contractor will be required to provide the services necessary to meet the needs of Spectrum Community Services. Each of the following items must be responded to in the bidder's proposal:

- The bidder shall provide a clear and concise description of how the bidder will provide the requested services.
- The bidder shall include a statement concerning bidder's ability to provide at least one on-site evaluation of the existing IT hardware and systems at the various locations and their communications' plan for the project. This statement must include a timetable for initiating and completing services.
- The bidder shall include a statement agreeing to County, State and Federal governmental audits of the bidder's project records including financial records if requested by said entities. They further agree to make those available for audit purposes in Hayward, California, within thirty (30) days of the applicable government agency's request.

B. Bidder's Experience:

Each bidder shall submit a statement of experience which shall include, but not be limited to, the following information:

- Business name, legal business status (i.e., partnership, corporation, etc.) of the prospective contractor and their DUNS number, if you have one.
- Number of years the prospective contractor has been in business under the present business name, as well as related prior business names.
- Examples of remote work flow projects conducted in the last two years.
- Details of any failure or refusal to complete a contract.
- To avoid a conflict of interest, employees, members of the Board of Directors or their family members are not eligible to submit bids for this work.
- Explanation of any litigation involving the prospective contractor or any principal officers thereof, in connection with any contract.
- Testimonials and references.

C. Bidder's Organization and Personnel

Each bidder shall provide the name of a contact person who will be available to Spectrum. This individual shall be responsible for contract negotiations with Spectrum in the event that the bidder is awarded the contract.

Bidder will provide a list of staff that will work on the project, their relevant experience, their rate of pay and percent of time to be spent of the project.

D. Subcontractors/Consultants:

If subcontracts are contemplated, a description of those persons or firms and the work to be done by them must be provided. This information shall also include the experience of the organization and staff as appropriate. Spectrum considers the prime contractor to be the sole point of contact with regard to this contract, and no subcontract may be entered into without the review and prior written approval of Spectrum.

E. Fiscal Responsibility:

Each bidder shall submit the following documentation:

- A list of commitments and potential commitments that may impact assets, lines of credit, guarantor letters or otherwise affect the bidder's ability to perform the contract.

F. Required Licenses and Insurance Policies:

At the time of the contract execution, the successful bidder must provide verification that the bidder is licensed to do business in the State of California, or that the bidder is exempt from this requirement. At the time of the contract execution, the successful contractor will be required to have in effect during the entire life of the agreement the following: Workers' Compensation; Employer's Liability Insurance; and Vehicle Insurance providing full mandatory coverage. The contractor will also be required to obtain and maintain a comprehensive general liability insurance policy with a combined limit of no less than one million dollars (\$1,000,000), which shall name Spectrum Community Services, its officers and employees as an additionally-insured party.

VII. BUDGET

- A. Each bidder shall submit a detailed, all-inclusive budget for the project, for providing the services described in **ATTACHMENT A**. Please attach additional budget information, if needed.
- B. The budget sheets shall be made a part of the contract. Under no circumstances will an indirect cost rate or administrative overhead be allowed to be charged against these funds.
- C. SPECTRUM reserves the right to further negotiate the contract fee with the successful bidder if it is in the best interest of SPECTRUM to do so, and to reject the bid if a mutually agreed upon amount cannot be negotiated.

VIII. PROPOSAL FORMAT AND PACKAGING

A. Format:

The proposal shall be submitted in the following manner and each item listed below must be included in the proposal:

- **RFP Cover Letter:** A signed RFP cover letter must be submitted with the original and four (4) hard copies and one (1) electronic copy of the proposal by the due date.
- **Technical and Management Proposals:** Each of the items listed in Section VI, A through D, of this RFP must be responded to in the proposal, using the same order and numbering system as found in Section VI.
- **Financial Reports:** Each bidder must submit a current list of commitments and potential commitments which may impact assets, lines of credit, guarantor letters or otherwise affect the bidder's ability to perform the contract.
- **Budget:** The budget must be a detailed, all-inclusive document as described in Section VII of this RFP.

B. Packaging:

All proposals must be packaged and delivered in accordance with the guidelines contained in Section IV, C, of this RFP.

IX. EVALUATION CRITERIA

A. General Information:

The evaluation of this RFP will be conducted by the evaluation panel.

Phase I: The evaluation panel will evaluate each proposal to determine whether it is properly and timely submitted, and whether all required information is included (see Sections VI, VII and VIII of the RFP). Proposals shall be assigned points in the manner outlined in Section VIII, B (below). In the event that proposals achieve equal rankings based on points, preference will be given to local entities or organizations.

B. Points:

Proposals will be evaluated based on the following:

- Proposed description of service and delivery, and a clear and concise description of how the bidder will provide the requested services 20 points
- Bidder’s experience at providing remote work flow solutions 20 points
- Ability to provide services in Alameda County on the effective date of the contract as described in this RFP 5 points
- Examples of Bidders previous remote work flow experience 10 points
- Bidder’s financial capacity 5 points
- Budget completeness and clarity 10 points
- Cost of service 20 points
- Examples or testimonials of any ongoing technical assistance and training service 10 points

Total Points 100 points

In case of points tie between the highest scoring bidders we will award the contact to the small, minority, women, or veteran owned organization.

C. Statement of Rights: Spectrum reserves the right to:

- Negotiate changes in the proposal with the bidder that is awarded the contract.

- Recommend and/or award in an amount less than requested in the bidder's proposal and/or for a reduction or increase in services provided commensurate with funds available.

ATTACHMENT A

CONTRACT ACTIVITIES FOR REMOTE WORK FLOW PROJECT

At a minimum, the Contractor shall provide:

- Workflow analysis to develop system to enable LIHEAP staff to work remotely including:
 - collaboration and productivity tools
 - simplification of work process
 - security of confidential information
 - creating “secure” digital workplaces
- IT support of the remote work environment during the contract period and then passed on to our regular support contractor
- Training modules for remote employees on
 - collaboration and productivity tools
 - digital work process
 - maintaining security
- Implementing analytics, key performance indicators and reporting for full visibility into employee productivity, including, training to use these
- an assessment of security practices including HIPPA and Personal Information requirements and recommendations for system improvement as needed.
- recommendations for software and hardware improvements;
- an assessment of how a document management system would streamline workflow and safeguard our data;
- a recommendation for a disaster plan as it applies to information technology;

ATTACHMENT B

Proposed Budget for Remote Work Project

PROPOSED BUDGET		BUDGET START DATE:		
		BUDGET END DATE:		
Please attach a separate budget sheet for each year, or if more space is needed				
VENDOR NAME		PROGRAM CONTACT PERSON		FISCAL CONTACT PERSON
		ADDRESS		ADDRESS
CITY, STATE, ZIP		PHONE		PHONE
		FAX		FAX
<i>DIRECT EXPENSE ITEMS:</i>				
SALARIES, Position, Consultants, etc	FTE	RATE	COST	NOTES
BENEFITS				
TOTAL SALARIES & BENEFITS				
OPERATING EXPENSES: Rent, Utilities, Supplies, Equipment, Postage, Travel, Audit Charges, Insurance, etc.	COST		NOTES	
TOTAL OPERATING EXPENSES				
TOTAL OF COMPLETE BUDGET				

(FTE: Full-time Equivalent based upon 40 hours per week)

ATTACHMENT C

NONDISCRIMINATION CLAUSE

Policy of Non-Discrimination and Applicability:

It is the policy of Spectrum to assure all persons of equal rights and opportunities with respect to employment in this agency and participation in, or receipt of, assistance from any program administered by Spectrum. Spectrum shall not discriminate on the basis of race, color, religion, ancestry, national origin, age, sex, marital status, medical condition, disability, veteran status, sexual orientation, nor any other category or classification that is either prohibited by law or unrelated to the work to be performed or the service to be provided.

This policy shall extend to all applicants for employment and all employees of Spectrum in all facets of hiring, promotion, compensation, training, benefits, layoffs, return from layoffs, terminations, and social and recreational programs. It shall similarly extend to all persons served by or seeking assistance from Spectrum. It shall also extend to any person participating in, or seeking to participate in a policy making, planning, advisory or governing body of Spectrum.

Under these laws, it is illegal in the workplace for an employee to engage in sexual advances, requests for sexual favors, verbal and physical conduct of a sexual nature, or any other verbal conduct that might be construed as an ethnic or religious slur.

Spectrum will comply with all provisions of a Drug and Alcohol Free Work Place requirement and provide a working environment, which is free from drugs/alcohol, and provides for a drug/alcohol free awareness program for employees.

Employees who fail to adhere to these policies are subject to immediate disciplinary action up to and including discharge. The Governing Board of Spectrum expects that all employees become familiar with the Agency's Affirmative Action Plan (AAP) and Disciplinary Appeal Procedure.

ATTACHMENT D

SPECTRUM TECHNOLOGY AND ELECTRONIC COMMUNICATIONS POLICY

Purpose and Scope

The purpose of this policy is to identify guidelines for the use of Spectrum technologies and communication systems. This policy establishes a minimum standard that must be up adhered to and enforced by users of SPECTRUM's technologies and communications systems.

The term "user" as used in these policies refers to employees (whether full- time, part- time, or limited-term), independent contractors, consultants, and any other use having authorized access to, and using any of, Spectrum's computers or electronic communications resources.

Computer and electronic communications resources include, but are not limited to: host computers; file servers; stand-alone computers; laptops; printers; fax machines; phones; online services; E-mail systems; bulletin board systems; and all software that is owned, licensed or operated by SPECTRUM.

Acceptable Use of Organization Property

Use of Spectrum's computers and electronic communications technologies is for programmatic and business activities of SPECTRUM. All use of such resources shall be in an honest, ethical, and legal manner that conforms to applicable license agreements, contracts, and policies regarding their intended use. Although incidental and occasional personal use of Spectrum's communications systems are permitted, users automatically waive any right to privacy.

In addition, the information, ideas, concepts and knowledge described, documented or contained in The Agency's electronic systems are the intellectual property of Spectrum. The copying or use of Spectrum's intellectual property for personal use or benefit during or after employment (or period of contract) with Spectrum is prohibited unless approved in advance, in writing, by the Executive Director or their designee.

All hardware (laptops, computers, monitors, mice, keyboards, printers, telephones, fax machines, etc.) issued by Spectrum is the property of Spectrum and should be treated as such. User may not physically alter or attempt repairs on any hardware at any time. Users must report any problems with hardware to their Program Manager.

Password Security

Users are responsible for safeguarding their login passwords. Passwords may not be shared, nor should they be printed or stored on-line. Users should not leave their computers unattended without logging off. Users are to provide their direct supervisor with their password.

Confidentiality

All information about individuals, families or organizations served by Spectrum is confidential. No information may be shared with any person or organization outside Spectrum without prior written approval of the individual, family or organization and the Spectrum Executive Director.

Copyrighted Information

Use of Spectrum electronic communication systems to copy, modify, or transmit documents, software, information or other materials protected by copyright, trademark, patent or trade secrecy laws, without obtaining prior written permission from the owner of such rights in such materials, is prohibited.

Other Prohibited Uses

Other prohibited uses of Spectrum's communication systems include, but are not limited to:

1. Engaging in any communication that is discriminatory, defamatory, pornographic, obscene, racist, and sexist or that evidences religious bias, or is otherwise of a derogatory nature toward any specific person, or toward any race, nationality, gender, marital status, sexual orientation, religion, disability, physical characteristics, or age group.
2. Browsing or downloading and/or forwarding and/or printing pornographic, profane, discriminatory, threatening or otherwise offensive material from any source including, but not limited to the internet.
3. Engaging in any communication that is in violation of federal, state or local laws.
4. Proselytizing or promoting a religious belief or tenet.
5. Campaigning for or against any candidate for political office or any ballot proposal or issue.
6. Sending, forwarding, redistributing or replying to "chain letters".
7. Unauthorized use of passwords to gain access to another user's information or communications on Spectrum systems or elsewhere.
8. Advertising, solicitation or other commercial, non-programmatic use.
9. Knowingly introducing a computer virus into Spectrum's communication system
10. Using Spectrum's system in a manner that interferes with normal business functions in any way, including but not limited to, streaming audio from the Internet during business hours, installing unauthorized software, resetting passwords for personal use to avoid access by others which prohibits access for legitimate Agency use and erasing phone records used to document legitimate Agency business such as in the case of social workers recording client records, etc...
11. Personal use of Spectrum's technologies that preempts any business activity or interferes with organizational productivity (such as shopping, eBay, the personals and other dating sites, chat rooms, etc.)
12. Sending E-mail messages under an assumed name or obscuring the origin of an E-mail message sent or received.

Disciplinary Action for Violations

Spectrum requires all users to adhere to this policy. Violations of this policy will result in disciplinary action, which could include termination of employment or cancellation of contracts. Please see Section XII of Spectrum Personal Policies & Procedures.

Reporting of Suspected Violations

Suspected violations of these policies should be immediately and confidentially reported to your immediate supervisor. If you prefer not to discuss it with your supervisor, you may contact the Executive Director or their designee.

Spectrum reserves the right to install programs that monitor employee use of the Internet and electronic communication systems and to act on any violations of these policies found through use of such programs. SPECTRUM further reserves the right to examine any and all electronic communications sent or received by employees via SPECTRUM's electronic communications systems.