



**Mercy Corps**

**Request for Proposal – M365 Migration**

Date – March 11<sup>th</sup> 2021

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## I. MERCY CORPS OVERVIEW

Mercy Corps is a global team of humanitarians, working together on the front lines of today's biggest crises to create a future of possibility, where everyone can prosper.

Our mission: to alleviate suffering, poverty and oppression by helping people build secure, productive and just communities.

In more than 40 countries around the world, our nearly 6,000 team members work side by side with people living through poverty, disaster, violent conflict and the acute impacts of climate change. We're committed to creating global change through local impact — 85 percent of our team members are from the countries where they work.

We bring a comprehensive approach to every challenge, addressing problems from multiple angles. Thanks to support from our extended global community, we've provided \$4 billion in lifesaving assistance to meet the urgent needs of more than 220 million people over nearly 40 years. In addition to emergency aid, we partner with local governments, forward-thinking corporations, social entrepreneurs and people living in fragile communities to develop bold solutions that make lasting change possible.

### **Through our impact, influence and innovations, in 2020 we:**

- Reached nearly 37 million people in more than 40 countries.
- Raised \$60.5 million for our COVID-19 Resilience Fund and have reached 15.1 million people so far through our response.
- Provided 1.8 million people with emergency cash assistance.
- Our work in the Democratic Republic of the Congo alone reached more than 4.9 million people
- Secured \$490 million in revenue from institutional and private funders in 2019.
- Piloted the use of 3D printing to support children with disabilities in Jordan's Za'atari refugee camp.
- Sponsored the Global Fragility Act, together with a coalition of 70 grassroots organizations, which created the first-ever U.S. government strategy to tackle alarming levels of global violence around the world. The act was signed into law in December 2019 after receiving bipartisan support in Congress.
- Launched FInX with a \$10M contribution from Ripple and Rippleworks with the goal to accelerate global financial inclusion by advancing innovative, responsible distributed ledgers, digital assets, cryptocurrencies and other digital financial solutions that help people join the global economy and lift themselves out of poverty.

See more details about our impact in 2020: <http://www.mercycorps.org>

## II. PROJECT BACKGROUND AND CONTEXT

Google G Suite lacks critical security and usability features which can cause issues of data loss and data exposure. A lack of data management and security controls also prevent us from being able to adhere to regulatory and donor compliance obligations such as GDPR. In an environment of escalating attention and regulation of personal data, it is no longer optional for Mercy Corps to utilize technologies that do not have adequate safeguards.

## III. DESIRED SERVICES & SCOPE OF WORK

### **Purpose / Project Description:**

Mercy Corps is transitioning from Google G Suite to the Microsoft Office 365 collaboration suite for its email, calendar, document management, and collaboration needs. This includes transitions from Gmail and Google Calendar to Microsoft Outlook and MS Exchange Online and Google Docs and Google Drive to MS Office (Word, Excel, PowerPoint), Teams and SharePoint.

### **Objectives:**

- Ensure all team members are successfully working and collaborating with M365 tools
- Migrate file-based data from Google G Suite, preserving as much history, formatting, and metadata as is possible; provide easy manual migration methods where automated migrations are not possible.
- Improve security, data protection and privacy, and compliance by implementing automated policies to safeguard data and manage identity
- Improve productivity and work quality utilizing MS tools such as Teams, SharePoint, and workflows to simplify and streamline common work tasks
- Minimize disruption and effort required by team members to adopt M365

### **Deliverables:**

- Migrate email and calendaring from Google to O365 with limited disruption to team members
- Migrate file-based data automatically; provide transition tools and guidance where this is not possible
- Introduce new collaboration tools such as Teams and SharePoint
- A network of support resources and staff are in place to provide users with the necessary training and support they need to be successful with MS Office 365

### **Timeframe / Schedule:**

The transition to Microsoft 365 will take place in phases in order to regulate the change management impact on Mercy Corps teams.

**User Adoption / Change Management (in partnership with the Mercy Corps project team)**

Requirement	Timeline
Create and schedule communications for each of the migration phases	All phases
Provide admin and user training	All phases

**Security (in partnership with the Mercy Corps project team)**

Requirement	Timeline
Establish security in all areas of M365 environment developed	All phases

**Phase 1 - Email / Calendar / Contacts Migration (in partnership with the Mercy Corps project team)**

Requirement	Timeline
Build and configure Exchange environment <ul style="list-style-type: none"><li>• Perform discovery to assess current environment and design and plan Exchange setup</li><li>• Consider conference room AV resources and incorporating AV hardware into resource bookings</li></ul>	Beginning immediately
Determine and design best approach for users to access Outlook <ul style="list-style-type: none"><li>• Web mail vs app and when to use</li><li>• Recommendations on amount of existing email accounts and data to be migrated</li></ul>	Beginning immediately
Global Address Book <ul style="list-style-type: none"><li>• Move distribution groups (Google Groups) into Microsoft environment</li></ul>	No later than August 31, 2021
Migrate email and calendaring for up to 5,800 global users from Google to Outlook	No later than August 31, 2021

**Phase 2 - Transition Google Drive files to Microsoft environment (in partnership with the Mercy Corps project team)**

<b>Requirement</b>	<b>Timeline</b>
Document the advanced prep work that will be required of MC users.	Beginning Fall 2021
Document what is not possible to migrate. (ex. external links.)	Beginning Fall 2021
Migrate Program and shared data contained in Google My Drive, preserving history, formatting, and metadata.	Beginning Fall 2021
Migrate data contained in Google Shared Drives, preserving history, formatting and metadata.	Beginning Fall 2021
Provide easy manual migration methods where automated migrations are not possible.	Beginning Fall 2021

**Phase 3 - SharePoint / MS Teams Architecture (in partnership with the Mercy Corps project team)**

<b>Requirement</b>	<b>Timeline</b>
Create an overarching, scalable SharePoint architecture that is not based on the current organizational chart.	Beginning Winter 2021
Create an automated system for generating new Programs in SharePoint.	Beginning Winter 2021
Create an automated system for provisioning groups to new Programs in SharePoint.	Beginning Winter 2021
Create an automated system for archiving programs when Programs close out.	Beginning Winter 2021
Create document classification and retention system for Programs.	Beginning Winter 2021
Create systems out of the box using the native toolset, without creating any custom code.	Beginning Winter 2021

Provide administrative training and documentation for each step so MC administrators can replicate any of the systems that are being created.	Beginning Winter 2021
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#### **Out of Scope**

- Google sites
- Licensing and installation of O3

### **IV. EVALUATION OF PROPOSALS**

Proposals will be scored using the following technical criteria. Points for each question will range from 0-25 the maximum technical score is 100 points. Proposals should address each evaluation criteria.

- Adherence to the RFP Requirements: Did the bidder conform to all requirements and product or service specifications in the RFQ or RFP? (0-10)
- Technical Criteria: Includes the bidder's understanding of the service or procurement required, bidders' management plan, supplier's qualifications and bidders' overall resources. Does the supplier have the right qualifications (registration, insurance, experience)? (0-35)
- Management Criteria: Includes the bidder's experience on similar projects, bidder's performance on similar projects, bidder's available facilities and resources for the project and the bidder's plan for management and control of the project. (0-30)
- Cost Criteria: Is the cost within any pre-determined price range, such as cost estimates from a market analysis? In most cases cost is evaluated using value for money unless otherwise directed by donor requirements. (0-25)

### **V. PROPOSAL FORMAT & REQUIREMENTS**

In order to secure information in a form, which will ensure that your proposal will be properly evaluated, you are asked to submit your proposal in the format listed below. Standard proposal formats are acceptable provided the following information is included:

1. Name, address, telephone number and email address for principal contact.
2. A brief outline of your organization and services offered, including:
  - Full legal name, jurisdiction of organization or incorporation and address of the company
  - Full legal name and country of citizenry of company's President and/or Chief Executive Officer, and all other officers and senior managers of the company
  - Year business was established
3. Name and professional qualifications of personnel who would provide the services.
4. Names, addresses, phone numbers and email addresses of at least two clients of similar industry and scope of operations as Mercy Corps that can be contacted as references.

## CONTACT FOR BID INQUIRIES

All inquiries concerning this solicitation shall be addressed to the following Designated Contacts:

- Mark Spencer | Global Procurement | [mspencer@mercycorps.org](mailto:mspencer@mercycorps.org) |

Please email an electronic version of your response (via e-mail), including all supporting documentation, and direct questions about the RFP to each of the designated contacts.

All questions should be submitted in writing (via email) citing the particular bid section and paragraph number. Bidders should note that all clarifications and exceptions are to be resolved prior to the submission of a bid.

Only questions received during the Question and Answer period (as outlined in the RFP Calendar) will be addressed. No telephone questions will be answered. Official answers to the questions will be posted on Mercy Corps website at [www.mercycorps.org/tenders](http://www.mercycorps.org/tenders)

## RFP CALENDAR/TIMELINE

- RFP published March 11<sup>th</sup> 2021
- Questions and Answers period March 11<sup>th</sup> to 23<sup>rd</sup>
- RFP responses due April 9<sup>th</sup> (5PM Pacific)
- Vendor selected and notified April

## VI. OTHER TERMS & CONDITIONS

### WITHDRAWAL OF RFP

Proposals may be withdrawn before the RFP submittal deadline by submitting a written request to the Contact Person. Re-submittal before the RFP submittal deadline can be made; however, they may not be re-submitted after the deadline.

### RFP COSTS

All costs incurred in the preparation and presentation of proposals to the RFP shall be completely absorbed by the responding party to the RFP. All documents submitted as part of the RFP will become property of the Mercy Corps. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.

### AWARD BASIS

At the option of the Mercy Corps, finalists for the Agent designation may be selected for a final round of negotiations; however, applicants are encouraged to present their best offers with their initial submission. Mercy Corps reserves the right to accept or reject any and all proposals, to waive any irregularities in any proposal process, and to make an award of contract in any manner in which Mercy Corps, acting in the sole and exclusive exercise of its discretion, deems to be in Mercy Corps best interest.



**CONTRACTUAL DEVELOPMENT**

Once an applicant is approved as the exclusive Agent, the successful respondent will enter into a contract with the Mercy Corps. Contract discussion and negotiation will follow the award selection. Bidders must be amenable to inclusion, in a contract, of any information provided whether herein or in response to this RFP, or developed subsequently during the selection process.

**CONTRACT TERMS**

Firms that are selected as the exclusive Agent are eligible to enter into a service contract. Mercy Corps may terminate the contract upon written notice to the Agent of not less than thirty (30) days.

**EQUAL OPPORTUNITY**

Mercy Corps emphasizes that all respondents will receive full consideration without regard to race, color, religion, sex, national origin, sex, disability, age or sexual orientation. Minority and women-owned firms are especially encouraged to respond to this RFP.

**LIMITATIONS**

Mercy Corps, reserves the right to reject any and all Proposals and to waive any informality in the solicitation process. Total proposal length excluding cover letter, details of professionals who will provide services, and contact information of client references, should not exceed 12 pages.