



**REQUEST FOR PROPOSAL**

**Organizational Change Management -  
Microsoft Teams & SharePoint**

INQUIRIES AND PROPOSALS SHOULD BE DIRECTED TO:

Ben Avey  
Chief Public Affairs Officer  
777 12th Street, Suite 250

Sacramento, CA 95814  
bavey@wellspacehealth.org

**I. GENERAL INFORMATION.**

- a. WellSpace Health is seeking proposals for Organizational Change Management services for the implementation of Microsoft Teams and SharePoint. Specifically, to work in partnership with IT Partner, WellSpace Health Leaders, and End-Users to frame out the organization's security groups (groups) and SharePoint pages, developing a training program for the use of Teams & SharePoint, and support implementation.
- b. Proposers may include individual consultants, consulting firms, and other organizations that assist organizations with Organizational Change Management using generally accepted change management strategies and tactics.
- c. Instructions on Proposal Submission

- i. Proposals must be submitted no later than 4 p.m. on February 5, 2021.
- ii. Inquires regarding this RFP should be submitted in writing:

Ben Avey  
Chief Public Affairs Officer  
[bavey@wellspacehealth.org](mailto:bavey@wellspacehealth.org)

- iii. Conditions of Proposal: All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Proposer and will not be reimbursed by WellSpace Health.
- iv. Your proposal should be addressed:

Chief Public Affairs Officer  
WellSpace Health  
777 12th Street, Suite 250  
Sacramento, CA 95814

It is important that all proposals be sent to [bavey@wellspacehealth.org](mailto:bavey@wellspacehealth.org) with the subject line "RFP for Organizational Change Management Services February 5, 2021 4 p.m." and submitted in PDF format clearly marking in the lower left-hand corner of the cover page with the following information:

Request for Proposal  
4 p.m., February 5, 2021  
Proposal for Organizational Change Management Services

It is the responsibility of the Proposer to ensure that the proposal is received by WellSpace Health by the date, time and in the manner specified above. Late proposals will not be considered.

- v. Small and/or Minority Owned Businesses: Efforts will be made by WellSpace Health to utilize small, women and/or minority owned businesses.
  - vi. Notification of Award: It is expected that a decision selecting the successful proposal will be made within four (4) weeks of the closing date. Upon conclusion of final negotiations regarding the successful proposal, all other Proposers will be informed by email of the results. It is expected that the contract shall be 6 month contract.
- d. Description of the Entity: WellSpace Health is a non-profit 501(c)(3) community health center system that provides comprehensive medical, dental, behavioral health, and supportive services to low-income and highly vulnerable patients. Ninety-one percent of WellSpace Health patients live below the federal poverty line. WellSpace Health has approximately 900 employees/volunteers at 31 centers in Sacramento, Placer, and Amador counties.

**II. PROJECT SCOPE.**

The proposer will work with stakeholders to design the structure of WellSpace Health's Microsoft Teams implementation and develop/implement a plan for organization-wide adoption by July 31, 2021. Project will include:

- a. Identify key stakeholders, champions, and user profiles
- b. Identify & select operational needs and scenarios
- c. Work with stakeholders (including IT Partner) and champions to create Group and Sharepoint structures to match operational needs and scenarios
- d. Conduct a pilot that includes users, champions, and IT professionals.
- e. Design, launch and manage your adoption campaign.
- f. Post adoption review and analysis.

- g. *WellSpace Health has an existing IT Partner who will be responsible for the technical implementation of Microsoft Teams and other Microsoft products.*

### **III. PROPOSAL CONTENT.**

- a. Description of your organization and change management philosophy.
- b. Description of your experience implementing Microsoft Teams for large, complex organizations.
- c. Description of how you will work with key stakeholders, including IT Partners, to develop Groups and SharePoint pages.
- d. Description of how you will engage and train end-users for adoption.
- e. Description of general implementation strategy.
- f. Proposed budget with cost structure if it includes hourly billing or fee based services.
- g. Proposed staffing, including resume of key staff.
- h. Three references from past clients with brief explanation of their project.

### **IV. PROPOSAL EVALUATION.**

- a. Submission of Proposals. All proposals shall consist of all documents together in one PDF format.
- b. Evaluation Procedure and Criteria. WellSpace Health's executive team, IT Partner, and appropriate staff will review proposals and make recommendations to the CEO for final approval.
- c. The review team may request a meeting with some qualified Proposers prior to final selection.
- d. Proposals will be reviewed in accordance with the following criteria:
  - i. Proposed approach to scope of work (20 points)
  - ii. Level of experience for key staff (20 points)
  - iii. Proposer's experience with similar clients and implementation (20 points)

- iv. Cost (40 points)
    - v. Interviews, if conducted (25 points)
  - e. Required Format for Proposals. All proposals must follow the required format. Failure to follow the required format may result in disqualification of a proposal:
    - i. Page Limit: 10, including cover page. Resumes not included in page limit.
    - ii. Page Size: 8 ½ x 11; portrait
    - iii. Font: 12 point Arial or Calibri
    - iv. Margins: 1" minimum on the top, bottom, and sides of all pages
    - v. All pages must be numbered
- V. **PROPOSAL TIMELINE.** During the period from your organization's receipt of this Request for Proposals and until a contract is awarded, your organization shall send all questions to WellSpace Health at [bavey@wellspacehealth.org](mailto:bavey@wellspacehealth.org).
- VI. **QUESTIONS.** Questions for the purpose of clarifying the RFP must be submitted in writing by email to [bavey@wellspacehealth.org](mailto:bavey@wellspacehealth.org) and must be received no later than 4:00 p.m. on February 1, 2020.
- VII. **RESERVATION OF RIGHTS.**
  - a. Contract Award: WellSpace Health reserves the right to award the contract in a manner deemed to be in the best interests of WellSpace Health.
  - b. WellSpace Health reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by WellSpace Health to be in its best interests.