



**Request for Proposal (“RFP”)  
Managed Service Provider  
[5/02/2023]**

**1. General Information**

The American Forest Foundation (AFF) unlocks the power of family forests as a climate solution while helping thousands of landowners care for their land and improve forest health. Through its Family Forest Carbon Program, AFF expands access to the voluntary carbon market for family forest owners from all walks of life while producing high quality forest carbon credits to help companies reach their net zero goals. The organization’s strategic direction seeks to enable family forests to capture and store one billion tons of carbon by 2050.

We do not do this alone. AFF works across a broad coalition of conservation partners, corporations, and policymakers to equip family forest owners with financial and technical support to implement sustainable forest management practices on their lands and activate their forests as a critical tool in the fight against climate change.

AFF is in a mode of complex problem solving and rapid iteration. All teams at AFF are working to discover solutions to the planet’s most pressing climate issues through developing and iterating viable and scalable models for impact. AFF is driven by values of our shared purpose, measurable and verifiable results, and learning for continuous improvement to tackle big conservation challenges.

**2. Scope of Services**

We are a 100-person team distributed across the United States with office presence and a concentration of about 35 staff in the DMV and about a dozen team members in Nova Scotia, Canada. We currently operate Windows and MacOS on Lenovo, Dell, and Apple laptops and desktops. We maintain a hybrid ready office in DC, host our email on O365 with Azure Directory, and our cloud storage on Sharepoint. AFF is looking for a managed service provider (“MSP”) to support the two person IT and Operations team in their mission to provide secure and seamless technology resources to AFF staff. We see this support broadly described in four buckets:

**User and workstation support, through the employee and hardware life cycle**

AFF is looking for a managed service desk that can support users from onboarding to offboarding including all forms of troubleshooting, and workstation procurement, setup, and decommissioning. Engineers should be directly accessible with transparent response expectations, and defined steps for escalation. All endpoints should be proactively managed with best in breed protection, support, and inventory tools. Examples may include day 1 workstation onboarding training, lost document recovery, regular software troubleshooting and upgrades.

**Security support, from prevention to remediation**

AFF believes data leaks and breaches are an unavoidable part of our current computing experience. AFF is looking for preventative training and tools to mitigate risk, and strong incident response and recovery support to navigate data loss with a minimum of business disruption. AFF expects its MSP to provide a combination of in-house and best of breed training, technology, insurance review, and SOC support. Examples may include annual cybersecurity training, threat response, and/or endpoint AV upgrades.

**Administrator Support**

AFF uses a wide range of technologies, from the ubiquitous Microsoft O365 to our very custom, in house developed CRM. On the average day, our staff members are heavily using the O365 suite along with Chrome, Slack, Zoom, Miro, Favro, Adobe, with additional softwares/Saas like ArcGIS, SiSense, Netsuite, Hubspot, Raiser’s Edge etc

depending on individual roles and responsibilities. AFF is looking for our MSP to efficiently partner with our IT team to administer and backstop these systems. Examples may include registering 40 web domains and registrations, proactively expanding cloud storage space, assisting staff in purchasing & installing user licenses.

**Strategic and Project Support**

AFF believes there is always a better mouse trap, but that doesn't mean we should always buy it. With the many tools out there, AFF is looking for a partner who can bring strategic thought to help evaluate a current process or software, taking into consideration the total cost of ownership of purchasing, migrating, and maintaining a new thing, and then providing (or help to procure) the technical experts for implementation support. Examples may include expanding our Single Sign On, offering a lower cost cloud storage, or sourcing a partner to upgrade or migrate our current Hubspot instance.

**3. RFP Process and Timeline**

Thank you in advance for your response. We appreciate the time and resources required to review and respond to our comprehensive requirements. So that AFF can best evaluate the RFP responses, we ask that you follow the timeline and response structure defined below.

The following outlines the timeline for this selection process.

Activity	Date
RFP release date	05/02/2023
Deadline for question submissions and confirmation of participation.	5/8/2023 by 5:00 pm EDT
Question submissions responses	5/12/ 2023 by 5:00 pm EDT
Proposal response deadline	5/17/2023 by 5:00 pm EDT
Finalist demonstrations	May-June, 2023
Contract award notification, negotiation, and finalization	June, 2023
Desired start date	Aug 1, 2023

Late proposals will not be considered.

**4. DEI and Environmental Commitments**

AFF believes in the principles of inclusivity and diversity and their merits and relationship to the development and nurturing of high performing organizations. Please share if and how your organization adheres to these principles.

AFF is committed to our mission which includes environmental conservation efforts across all our business activities. Please share if and how your organization has any sustainability or environmental efforts or standards.

**5. Submission Process**

All vendor responses must be submitted to [Matthew Travis](#) electronically in PDF or Microsoft Office format no later than 5PM EDT/EST on the designated RFP response deadline date. Each vendor should address the following items in their proposal response:

- A description of the company's history, vision, qualifications, and experience including what proportion of the client base are non-profit organizations and the rate of client turnover over the past 5 years.
- An overview of how the vendor will meet the Scope of Services envisioned in Section 2.

- An overview of the resources to be assigned to the project including staffing, infrastructure, and skill sets. If recommending more than one party's involvement, the response should explain all such relationships.
- Approach and methodology to achieve the requirements, including insights that can proactively improve the procured good or service.
- A detailed budget.
- The vendor's policy regarding on-going fees / project rates and scoping.
- An outline of all insurance maintained.
- Any DEI or environmental commitments per Section 4 above.
- Guidelines and requirements from the vendor for the timing of contracting and implementing MSP services.

All vendor responses will be treated as proprietary information and will be used solely for the purposes described herein.

## **6. Evaluation Method**

The evaluation and acquisition of services or goods will be done in two phases.

The first phase includes the distribution of this RFP and the evaluation of responses. Responses will be evaluated to determine which vendors provide the closest match to AFF's requirements.

In the second phase, successful respondents will be invited to meet with the AFF team to review their proposals and demonstrate their proposed solutions. These discussions will provide the organization with the opportunity to evaluate factors which include the vendor's ability to support the solutions and the overall quality of the vendor's offering. In addition, as part of the second phase, AFF will contact current client references provided by the respondent to review their use of proposed services and evaluate their satisfaction with the respondent's methodology, performance, and support capabilities.

Each vendor will be evaluated against the same set of criteria. Final scores and evaluation results will not be provided to respondents. The categories associated with the evaluation will match the four primary buckets described in Section 2, the items requested in Section 5, as well as the total cost of services.

Final Notes: AFF may make any and all inquiries as to the abilities of the individuals or organizations to satisfy requirements of the RFP and to perform the work. This RFP is not an offer to enter into an agreement with any party but rather, it is a request to receive proposals from respondents interested in providing the services specified herein. AFF reserves the right to reject any or all proposals submitted and to contract in the best interests of AFF. AFF is not responsible for any costs or damages associated with responses nor the decision process, including copyright or other rights, regardless of the award or rejection of a proposal. Neither this solicitation, nor any proposal, counterproposal, other written nor oral statement will be construed as a binding services agreement or as a contract to enter into such an agreement.