



Request for Proposal: IT Consultancy Services for Needs Assessment, Platform Migration, and Implementation Support

Introduction

The Women's Impact Alliance is actively seeking an experienced IT consultant to play a crucial role in our migration to a new platform (Zoho). In addition to this, the consultant will have the opportunity to evaluate our technology requirements for future growth and innovation. This will involve identifying gaps in our current systems and determining areas where technology can enhance process improvement, automation, scalability, and agility. The primary objective of this project is to streamline our IT systems, enhance programmatic and operational efficiency, and ensure a seamless transition to the new platform. As a consultant, you will be instrumental in this transformation, contributing to the advancement of our mission and the success of our programs. By the end of the project, we aim to achieve the following goals:

- Streamline our existing systems and consolidate multiple platforms to establish a source of truth to eliminate duplication and reduce inefficiencies.
- To enhance efficiency and productivity by integrating our CRM with our email system to reduce the time spent managing interactions with community members and create a seamless workflow for the team.
- Improve operational efficiency by implementing a functional dashboard with completed user set up.

Background

WIA's mission is to advance the world's highest potential and game-changing women leaders in social and environmental change. We exist to accelerate women leaders of change into positions of power and influence so that decisions are made in the interests of humanity and the planet, resulting in a just, sustainable, and peaceful world.

At WIA, we offer executive coaching and leadership training to women who might not have access to these services due to financial constraints. All our programs and operations are entirely remote, making it easy for anyone to participate. To manage our program, we use several systems, including Airtable, to manage applications and match participants with coaches. We use



several other platforms to manage contracts, event notifications, host live events, knowledge, and donor management, including Airtable, Tally, HelloSign, MailChimp, and Bloomerang.

Scope of Work

The selected consultant will be required to perform the following tasks:

1. Conduct a thorough needs assessment to gain insights into the organization's IT infrastructure, recognize pain points, and suggest alternative options to replace current platforms.
2. Develop a migration plan that includes key milestones, timelines, and a risk mitigation strategy. Examine the entire range of data to be migrated. Identify potential conflicts and data quality issues and eliminate duplications and anomalies before the migration.
3. Assist in transferring content from existing platforms to selected platforms (including Zoho). This will require working collaboratively with the team and third-party vendors to ensure a seamless transition with minimal disruption to daily operations. Additionally, provide support in setting up users and permissions within Zoho.
4. Create an IT roadmap that aligns with WIA's strategic vision.
5. Develop a detailed implementation plan based on the lessons learned from the migration and needs assessment. This plan should be comprehensive, provide recommendations, and include costing of recommended software and additions.
6. Assist with documenting best practices, checklists, and IT support policies.
7. Any other business that might be aligned with the scope of work.

Minimum Qualifications

The ideal consultant for this project must have at least five (5) years of professional experience in IT, with a focus on providing services to organizations similar to WIA and within the scope of work highlighted in this project. Their primary area of expertise should be providing IT professional services, including IT infrastructure design, implementation, and management.

In addition, the consultant must have extensive knowledge of Airtable and Zoho, and preferably, they should possess experience with CRMs and low-code app and process development.



Submission Requirements

The proposal should include the following:

- **Professional Profile:** An overview of consultant's experience and expertise relevant to this project and a CV that details relevant skills and qualifications
- **Technical Approach:** Detailed description of the approach and technique on how you plan to meet the project's objectives.
- **Past Performance:** Brief details of organizations for which same or similar work has been performed.
- **References:** Contact details for three recent references: name, email and relationship and brief explanation of your work with them.

Remuneration and budget

Fees upon completion of activity

Activity	Payment
Conduct a thorough needs assessment to gain insights into the organization's IT infrastructure, recognize pain points, and suggest alternative options to replace current platforms.	\$3000
Develop a migration plan that includes key milestones, timelines, and a risk mitigation strategy	\$2500
Complete Migration of content from existing platforms to selected platforms(including Zoho) and set up users in Zoho	\$7000
Develop a detailed implementation plan based on the lessons learned from the migration and needs assessment.	\$7000

Evaluation Criteria

Candidates will be evaluated based on their experience, qualifications and proposed technical approach.

Period of Performance: The consultant's period of performance of 4 months, which begins on July 1- October 30, 2024.

Interested consultants should electronically submit their proposals to team@thewia.org with the subject line "**IT Consultant for WIA**" by June 7, 2024.