

Tableau Cloud Migration Services for KIPP Foundation

Request for Proposal

GENERAL INSTRUCTIONS

Inquiries

- Responses to this Request for Proposals (“RFP”) should be submitted via email to:
 - o Email Recipients: SSharma@kipp.org ; jzhang@kipp.org; procurement@kipp.org
 - o Subject Line: “RFP - KIPP Foundation Tableau Cloud Migration”
- Please submit questions via e-mail to: SSharma@kipp.org ; jzhang@kipp.org; procurement@kipp.org.
- For the purpose of this RFP, the KIPP Foundation is herein referred to as “KIPP” or the “Foundation” and any bidding party participating in the RFP is herein referred to as “Vendor” or “Solution Partner.”

Confidentiality

- This RFP contains proprietary and confidential information that cannot be divulged to any third party without the express written authorization of KIPP and requires that Vendor use the information contained within this RFP solely for responding to the RFP and that all such information contained herein or obtained during discussions with KIPP be held in strict confidence. No public announcements or any references to this RFP shall be made outside Vendor’s organization without the prior consent of KIPP.

Reserved Rights

- This RFP does not constitute an offer to buy on the part of KIPP. Acceptance of any obligations on the part of KIPP may only be done by a formal written agreement. Any information contained herein does not commit KIPP to a contract or to pay any costs incurred in the preparation of a response. Nothing contained herein shall be construed as guaranteeing any term, condition or other item, including any specified purchase volume.
- KIPP reserves the right not to award a contract to any bidding party even if the criteria described in the RFP are met; and to close the bid prior to completion of the bid process. While KIPP does not intend to split award to multiple bidders, KIPP reserves the rights to split award to multiple bidders that will best serve the needs and interests of KIPP. No obligations on the part of KIPP will be incurred until the bidder has signed a contract satisfactory to and accepted by KIPP.

Contract Terms and Conditions

- The selected Vendor’s proposal may be incorporated into KIPP’s contract with such Solution Partner. Therefore, all contract terms and provisions are required to be outlined in detail. There must be a confidentiality provision in the actual contract.

Deliverable-Based Commercial Model

- This engagement is strictly deliverable-based and fixed-fee. KIPP is purchasing completed, validated, and accepted migration outcomes, not labor hours, staff augmentation, or time-and-materials services. Invoices may be submitted only after written acceptance of the corresponding deliverable.

Final Selection and Engagement

- Once the finalist presentations have been conducted and references checked, the KIPP selection committee will meet and make a decision as to the selected Vendor who will then be advised and engaged. The other Solution Partners will be advised of KIPP's decision.

RFP TIMING

RFP Release Date:	September 18th, 2026
Contact for questions:	SSharma@kipp.org; jzhang@kipp.org; please also cc procurement@kipp.org Please include subject line "RFP - KIPP Foundation Tableau Cloud Migration questions"
Deadline for questions:	Sep 25th, 2026 5PM ET
Virtual Q&A session (optional):	Sep 29th, 2026 at 11AM - 12PM ET To attend please email SSharma@kipp.org; jzhang@kipp.org; cc procurement@kipp.org by Sep 24th, 2026 5PM ET with list of attendee emails to receive invite (email subject line: "RFP - KIPP Foundation Tableau Cloud Migration - Q&A session") (Note: if the Q&A session date shifts, attendees will be notified in advance)
RFP Due Date:	Oct 1st, 2026 5PM ET
Finalist Presentations:	Oct 6th-7th
Vendor Award:	On or before Oct 13 th . Note that the date is tentative as negotiations may take longer than expected.

GENERAL PLAN INFORMATION

Introduction

KIPP Foundation is seeking proposals from qualified Tableau implementation partners to plan, execute, validate, and stabilize the migration of KIPP Foundation and KIPP regional Tableau environments from Tableau Server to Tableau Cloud. The engagement includes technical migration services, program and stakeholder management, communications, testing, training, adoption support, governance, cutover, and post-migration stabilization.

Organizational Context

KIPP is a national K-12 network of public charter schools educating over 120,000 students across 26 regions. KIPP regions across the country vary greatly in size between 1 to 58 schools and serving anywhere between 270 and 30,000 students.

Each regional KIPP organization is a separate, autonomous entity that oversees its local schools and provides shared administrative and instructional services that ensure execution of operations and academic strategies. Additionally, all KIPP network regions operate with support from the KIPP Foundation, a national non-profit that works to ensure strong outcomes across all KIPP regions through setting a clear bar for excellence, defining network-wide priorities, building local capacity, providing implementation support, and driving learning and accountability.

Because each KIPP region is an independent entity and impacted by nuanced local policies and constraints from district charter authorizers and state departments of education, there is a diverse ecosystem of data systems leveraged across the network to manage operations, instruction, HR, and student information. The KIPP Foundation's Data & Technology team supports KIPP regions by providing services such as shared technical infrastructure for some more commonly adopted systems, analytics capabilities, and technical guidance.

KIPP operates one shared Tableau Server platform that hosts 30 Tableau sites in total: 2 sites managed for KIPP Foundation and 28 regional sites, one for each KIPP region. The references to Foundation and regional work in this RFP describe groups of sites and migration phases within this shared platform, not separate Foundation and regional Tableau Server environments. FY27 is July 1, 2026 through June 30, 2027. During FY27, the Vendor will migrate the 2 KIPP Foundation sites to Tableau Cloud. FY28 is July 1, 2027 through June 30, 2028. During FY28, the Vendor will migrate the 28 regional sites to Tableau Cloud.

Current Tableau Environment

KIPP currently operates one shared on-premises Tableau Server platform with three lifecycle environments: Development (DEV), Stage (STAGE), and Production (PROD). Across the shared platform, Production hosts 30 Tableau sites in total: 2 KIPP Foundation-managed sites and 28 regional sites, one for each KIPP region. DEV, STAGE, and PROD are lifecycle environments for the shared Tableau platform; they are not separate Foundation and regional Tableau environments.

The target Tableau Cloud architecture must provide four logically separated lifecycle environments: Development (DEV), Stage (STAGE), User Acceptance Testing (UAT), and Production (PROD). Each Tableau Cloud environment must align with the corresponding Microsoft Fabric Data Warehouse environment: DEV to DEV, STAGE to STAGE, UAT to UAT, and PROD to PROD. UAT will be the controlled business-validation environment after Stage validation and before Production release.

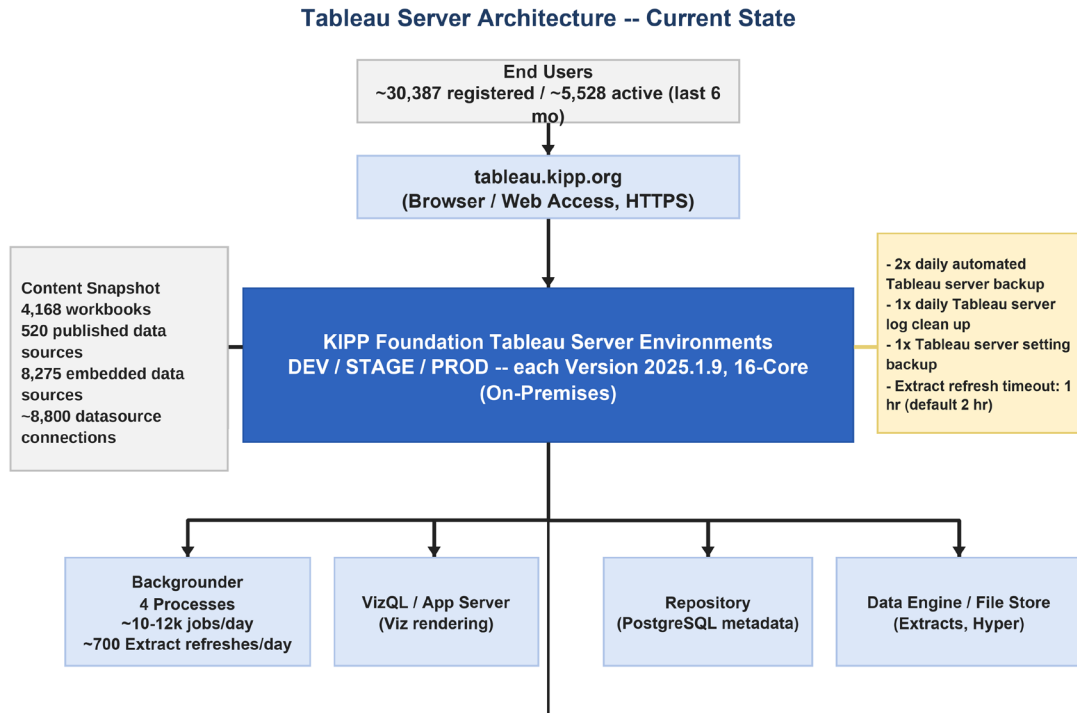
The Vendor must design and implement environment separation, site and project structures, identity and access controls, connection mapping, Tableau Bridge components where required, content-

promotion procedures, validation gates, deployment controls, monitoring, and governance appropriate to the four-environment lifecycle.

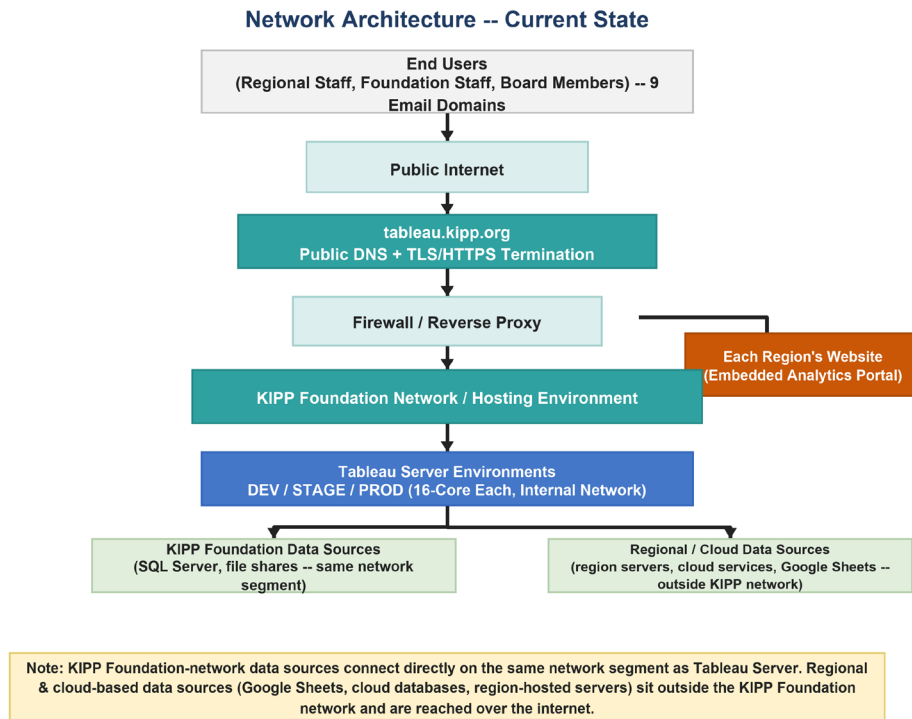
Current-State Architecture

The current-state Tableau Server architecture depicts one shared Tableau platform with DEV, STAGE, and PROD lifecycle environments and 30 Production sites: 2 KIPP Foundation-managed sites and 28 regional sites. The Vendor must validate the diagrams during discovery and document any changes or exceptions.

1. Tableau Server Architecture

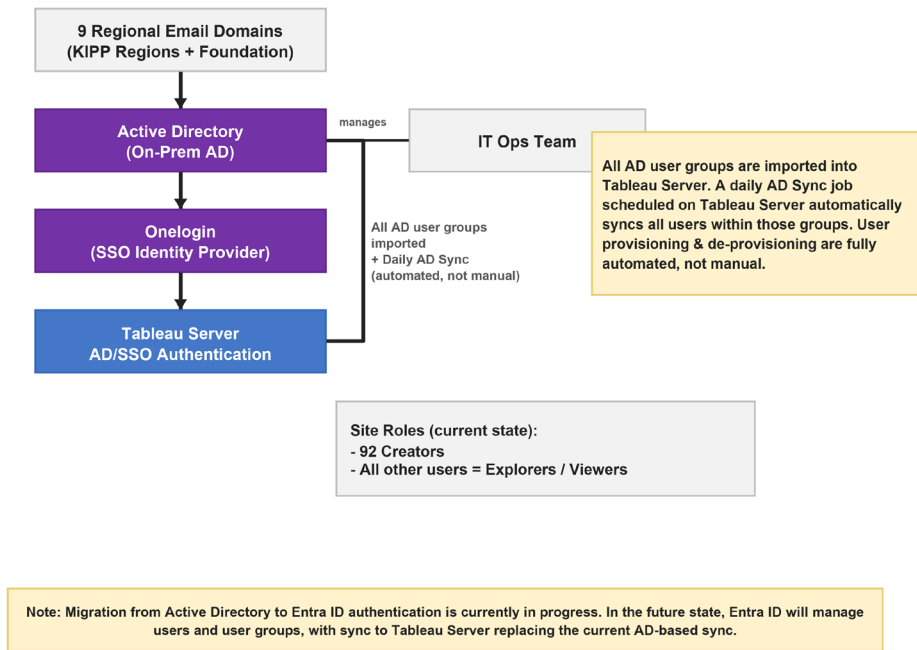


2. Network Architecture

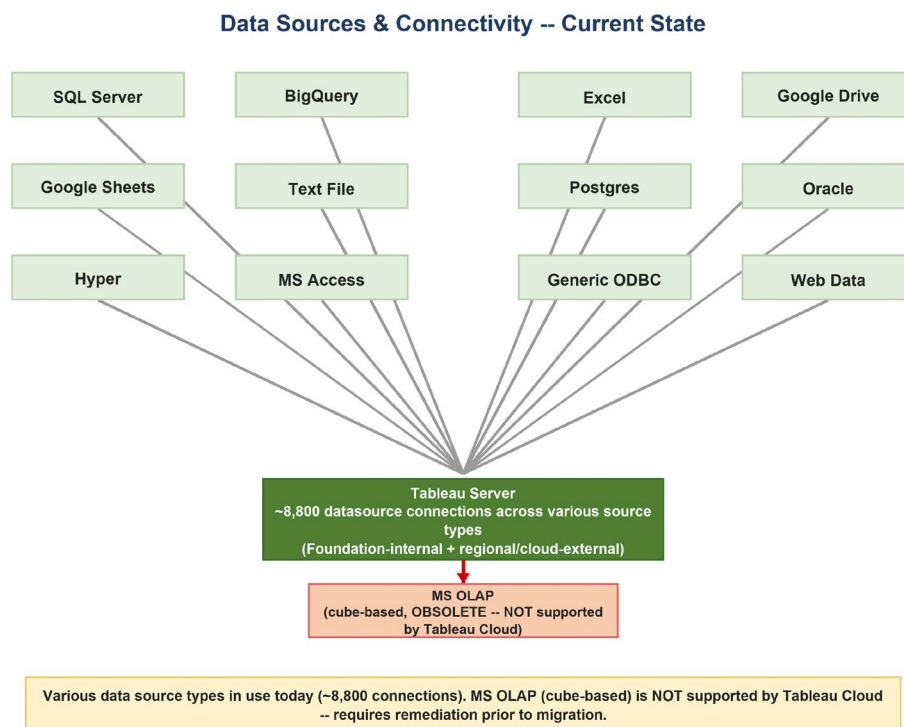


3. Identity & Access Management

Identity & Access Management -- Current State

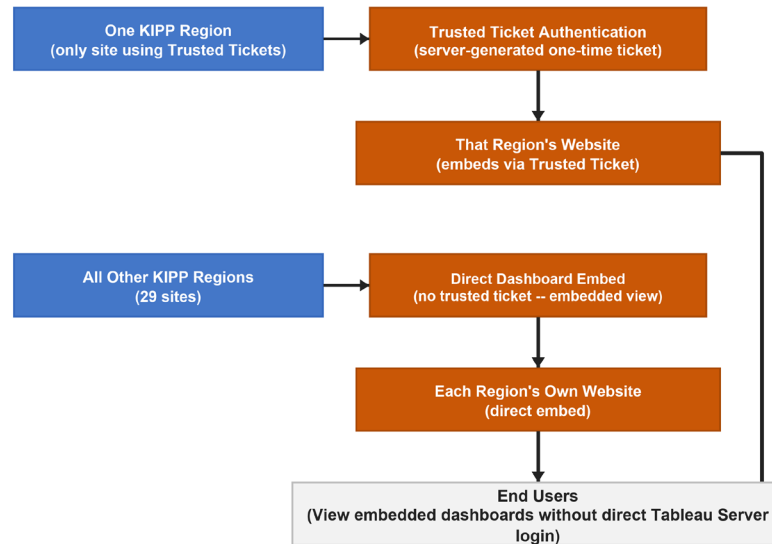


4. Data Sources & Connectivity



5. Embedded Analytics

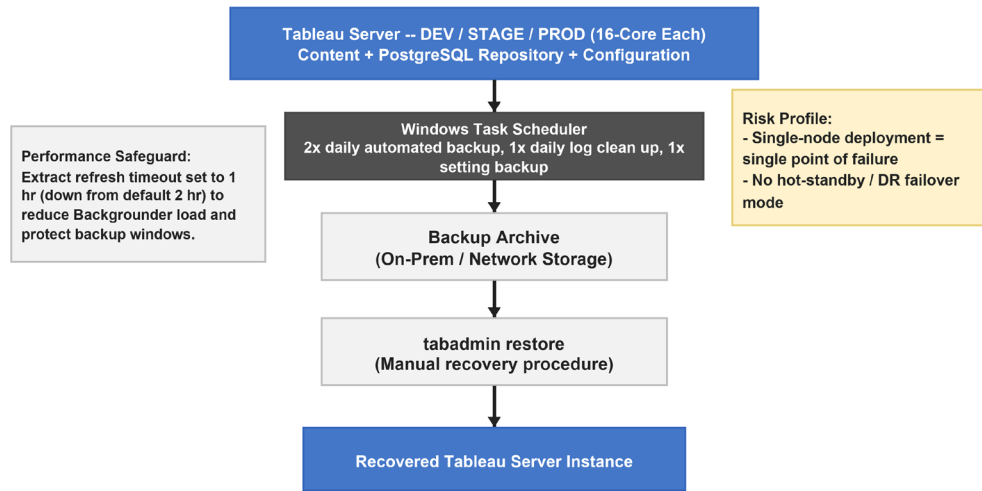
Embedded Analytics -- Current State



Note: Only one KIPP region uses Trusted Ticket Authentication for embedded analytics. All other regions embed Tableau dashboards directly into their own websites without a server-generated trusted ticket.

6. Backup & Recovery Architecture

Backup & Recovery Architecture -- Current State



SCOPE OF SERVICE

Project Objectives

- Migrate all in-scope Foundation and regional Tableau sites while ensuring cloud compatibility, users and groups and contents to Tableau Cloud with complete reconciliation and documented disposition of exceptions.
- Design and configure a scalable, secure, governed, and supportable Tableau Cloud architecture with DEV, STAGE, UAT, and PROD aligned to the corresponding Microsoft Fabric Data Warehouse environments and other data sources used by dashboards.
- Validate data source connections, permissions, extract refreshes, subscriptions, embedded analytics, SSO authentication and authorization, users and groups provisioning automation, performance, and user acceptance.
- Establish governance, operating procedures, training including Tableau Pulse feature, support, and knowledge transfer so KIPP can operate the environment after Hypercare.
- Provide end-to-end project management services including development of plan for Foundation and regional sites, including communication & co-ordination, tracking progress/updates, action items and risks, meeting facilitation and scheduling.

The scope of this engagement includes:

- Discovery and inventory of all Foundation and Regional Tableau assets
- Migration planning, including a detailed migration wave plan by region/site, security architecture, Access Control Matrix, migration retention and archival strategy for active contents, archived contents, retired contents and obsolete contents, Tableau Cloud backup and recovery strategy, incident response procedures, post-migration security assessment and validation, Hypercare.
- Pre-migration preparation, including Workbook and data source remediation, archiving unneeded data sources and workbooks and views, content organization structure per organizational context and best practices, validating users and groups and all needed works and server cleanup to ensure environment readiness for migration. The vendor must take a proactive approach to cloud compatibility, implementing changes wherever possible to support Foundation and regional reporting teams and seeking their inputs where needed.
- Migrate all in-scope Tableau sites, users and groups, projects, workbooks, permissions, data sources, schedules, favorites, collections, extract refresh tasks, subscription tasks and all needed contents while ensuring cloud compatibility.
- Tableau Cloud configuration
- Tableau Bridges deployment
- Identity and Access Management: Entra ID integration work for the on-premises server is already underway. The Vendor shall assess Tableau Cloud compatibility with this work and perform all additional provisioning, role-based access control (RBAC) configuration, synchronization, governance, and migration work required.
- Testing (functional, performance, and user acceptance) to validate that migrated assets retain equivalent functionality, security, ownership, and lineage after migration, ensure content is rendering correctly, data connections function well, permissions match the original structure and performance is as expected.
- Project Management: Vendor shall provide end to end project management services for Foundation sites and Regional sites including developing and maintaining detailed project plan,

track risks and action items, meeting scheduling and facilitation with Foundation and regional staff involved in migration, communications and follow-ups.

- **Training and Change Management:** Vendor shall provide all communications, Role-based training for all user types, readiness activities, adoption support, and stakeholder engagement necessary to ensure successful use of Tableau Cloud following migration. Vendor shall develop and execute a Training and Change Management Plan covering Foundation and regional stakeholders. Vendors must minimize reliance on KIPP resources for execution of these activities.
- **Go-live support and post-migration Hypercare:** Following each migration cutover, Vendor shall provide a structured Hypercare period. Hypercare shall include proactive system monitoring, incident management, defect remediation, user support, production validation, issue triage, stakeholder communications, and transition-to-support activities. Vendor shall remain accountable for migration-related defects identified during the Hypercare period. Vendors may propose enhancements to these requirements but shall identify all deviations.

The scope of Hypercare includes:

- Tableau Cloud platform monitoring
- Tableau Bridge monitoring
- Workbook issue remediation
- Data source issue remediation
- Subscription validation
- Refresh-task monitoring
- User-access troubleshooting
- Embedded analytics troubleshooting
- Migration-defect remediation
- End-user support coordination
- Regional support coordination
- All possible issues that need to be addressed

Hypercare SLA:

Severity	Initial Response
Critical	1 hour
High	4 hours
Medium	1 business day
Low	2 business days

Turnkey Delivery model

KIPP seeks a turnkey implementation partner. The selected Vendor shall provide all project management, solution architecture, migration execution, testing coordination, stakeholder management, communications, training, cutover, Hypercare, and knowledge-transfer activities necessary to achieve successful migration outcomes. KIPP expects the Vendor to lead and coordinate the engagement end-to-end and to minimize dependence upon KIPP resources for day-to-day project execution. KIPP's role will primarily be limited to governance, decision-making, access provisioning, business validation, and deliverable acceptance. Vendors shall clearly identify any assumptions regarding KIPP participation.

Phase 1, Discovery and Design

- Conduct stakeholder and technical discovery.
- Produce a reconciled inventory of sites, projects, workbooks, views, data sources, users, groups, permissions, schedules, subscriptions, embedded content, and integrations.
- Deliver future-state architecture, migration strategy, wave plan, acceptance framework, rollback approach, RAID log, communications plan, and project schedule.

Phase 2, Foundation Migration in FY27

- Configure DEV, STAGE, UAT, and PROD Tableau Cloud lifecycle environments and map each to the corresponding Microsoft Fabric Data Warehouse environment.
- Prepare, remediate, migrate, reconcile, test, and obtain business acceptance for Foundation content.
- Provide role-based training for Foundation administrators, developers, analysts, and business users, and shall develop user guides, office hours, recorded training sessions, migration communications, readiness materials, and adoption support.
- Provide go-live support, Hypercare, issue resolution, troubleshooting, and transition-to-support documentation.
- Complete cutover, training, 30-day Hypercare, and stabilization during FY27, July 1, 2026 through June 30, 2027 for Foundation sites.
- Success criteria for this engagement include successful migration and demonstrated user adoption, not merely completion of technical migration tasks.

Phase 3, Regional Migration Waves in FY28

- Confirm readiness and migration scope with participating regions.
- Vendor is responsible for coordinating directly with regional stakeholders, scheduling migration activities, tracking readiness, resolving blockers, conducting testing, and supporting adoption across all KIPP regions.
- Execute pilot and subsequent regional waves using the accepted migration runbook and acceptance criteria.
- Provide role-based training for regional site administrators, developers, analysts, and business users, and shall develop user guides, office hours, recorded training sessions, migration communications, readiness materials, and adoption support.
- Provide go-live support, 15-day hypercare per wave, 30-day network-wide stabilization period after the final regional wave, issue resolution, troubleshooting, and transition-to-support documentation.

- Complete regional migration, training, cutover, and stabilization activities during FY28, July 1, 2027 through June 30, 2028.
- Success criteria for this engagement include successful migration and demonstrated user adoption, not merely completion of technical migration tasks.

Vendor Responsibilities & Contractual Terms

- **Vendor Responsibilities**

The Vendor will act as the overall program lead and will own: program planning; project management; stakeholder coordination; communication planning; meeting facilitation; status reporting; issue tracking; risk management; regional outreach; workbook migration; site migration; user migration; security validation; testing; training; cutover execution; Hypercare; and support. Vendor shall provide all required project resources necessary to complete the engagement. Vendor shall not assume KIPP will provide project management, migration engineering, testing coordination, communication management, change management, training development, technical architecture, or deployment resources unless explicitly approved by KIPP.

- **Prime Contracting Entity and Subcontractor Use**

The Vendor will be deemed the prime contracting entity with sole responsibility for delivery of all products and services described in this RFP, regardless of whether any portion of the work is subcontracted. If the Vendor intends to use a subcontractor or third party for any part of this engagement, the Proposal must identify each such entity (company name, point of contact, and role), describe the services each will provide, and confirm that each subcontractor will be contractually bound to conform to the terms of any agreement between KIPP and the Vendor. The Vendor retains full responsibility and liability for work performed by any subcontractor.

- **Data Protection, Security, and PII Requirements**

Given the nature of the data involved, Vendor must be able to agree to all of the following measures to protect KIPP's PII disclosed as part of this engagement:

- Maintain controls consistent with a recognized framework such as SOC 2 (Trust Services Criteria), ISO/IEC 27001 (with ISO/IEC 27017 and 27018 for cloud and personal data), and the NIST Cybersecurity Framework 2.0
- Maintain Cyber Liability and Technology Errors & Omissions insurance, covering security incident response costs, regulatory fines, and third-party claims arising from a breach of student data. (See "Insurance and Indemnification" section below for minimum coverage requirements)
- Apply industry-standard encryption in transit and at rest
- Use secure transmission protocols
- Maintain network firewalls and intrusion protection
- Maintain documented incident response and data retention procedures
- Maintain backup and restoration processes

- Apply password protection for access to PII maintained on computer systems or databases
- Maintain any physical materials containing PII in locked cabinets, file drawers, or other secure locations when not in use
- Limit access to data to authorized personnel who are bound by confidentiality obligations and trained on data protection
- Apply role-based access controls
- Secure all personnel accounts with multi-factor authentication (MFA)

- **Insurance and Indemnification**

Vendor shall maintain, at minimum, the following insurance coverage throughout the term of the engagement and provide certificates of insurance upon request: Commercial General Liability; Cyber Liability and Technology Errors & Omissions; Professional Liability (Errors & Omissions); and Workers' Compensation as required by law. Vendor shall indemnify, defend, and hold harmless KIPP Foundation, its officers, employees, and affiliated regional entities from and against any third-party claims, losses, or damages arising from Vendor's negligence, willful misconduct, or breach of this engagement, including any unauthorized disclosure of KIPP data. Specific coverage minimums and indemnification language will be finalized in the definitive services agreement; Respondents should confirm in their Proposal their willingness to accept insurance and indemnification terms substantially similar to those described here, and note any exceptions.

- **Intellectual Property Ownership**

All deliverables, work product, documentation, configurations, and custom code created by Vendor specifically for KIPP under this engagement shall be considered "works made for hire" and shall become the sole property of KIPP Foundation upon payment. Vendor's pre-existing tools, accelerators, methodologies, and general-purpose intellectual property used to deliver the engagement ("Vendor Background IP") shall remain the property of Vendor, provided that Vendor grants KIPP a perpetual, royalty-free license to use any Vendor Background IP embedded in deliverables for KIPP's internal purposes. Respondents should identify in their Proposal any Vendor Background IP they anticipate incorporating into deliverables.

- **Confidentiality and Non-Disclosure**

In addition to the confidentiality obligations described in "Confidentiality" section of "General Instructions" above, the Vendor and KIPP will execute a mutual non-disclosure agreement prior to Vendor's access to KIPP data, systems, or discovery documentation. Vendor shall treat all KIPP data, including student and staff PII, as strictly confidential, shall limit access to personnel with a legitimate need to know, and shall return or securely destroy all KIPP data upon completion of the engagement or KIPP's request.

- **Term, Termination, and Standard Contract Terms**

The definitive agreement resulting from this RFP will include standard terms covering: term and renewal; termination for convenience (with reasonable notice) and termination for cause; transition assistance obligations upon termination or completion, including return of KIPP data and orderly knowledge transfer; limitation of liability; dispute resolution; and compliance with applicable federal, state, and local law, including student data privacy laws applicable to KIPP's

operating regions. Respondents should confirm their willingness to negotiate a definitive agreement on substantially these terms, and should attach any standard Master Services Agreement, Statement of Work template, or Order Form they would propose using as a starting point for negotiation.

Deliverables

- Enterprise Tableau inventory, reconciliation package, detailed Project Plan with dependencies, risks, decisions and action items
- Future-state four-environment Tableau Cloud architecture and design documentation
- Future-state security, compliance, and Identity Management package including security architecture, Entra ID integration, security validation testing, incident response procedures, security runbook, final security assessment report.
- Foundation migration and acceptance package
- Regional pilot and regional-wave migration acceptance packages
- Testing, UAT, cutover, rollback, training and change management and training related documentations, governance, Hypercare, and knowledge-transfer packages

Submission Instructions

Please submit your proposal, including:

- **Required Proposal Sections**

Respondents must organize their Proposal using the following structure (see also Exhibit A):

1. Executive Summary – a concise overview of your proposed solution and why your organization is well-suited to this engagement
2. Company Qualifications and Tableau Cloud Migration Experience – including examples of comparable large-scale, multi-site migrations
3. Proposed Team and Key Personnel – completed per Exhibit C.
4. Methodology and Approach – addressing discovery, migration execution, testing, and cutover
5. Project Management Approach – detailed project scope, timelines and milestones, governance, reporting, and risk management practices
6. Training and Change Management Approach
7. Sample Deliverables – representative examples from prior engagements, where permitted by client confidentiality
8. Assumptions and Exclusions
9. Vendor Information Form – per Exhibit D
10. Pricing – submitted separately per Exhibit B; do not include pricing in any other section

- **Submission Logistics**

- **Format:** Proposals must be submitted electronically in a single PDF or Microsoft Word-compatible file (pricing per Exhibit B may be submitted as a separate Excel file).
- **Where to submit:** By email to the Point of Contact identified in “General Instructions”, with “RFP – Tableau Cloud Migration” in the subject line.
- **Deadline:** As specified in “General Instructions”, All times refer to Eastern Time unless otherwise noted. Proposals received after the deadline will not be considered, absent prior written accommodation from KIPP.
- **Proposal validity:** Proposals, including pricing, must remain valid and open for acceptance for a minimum of ninety (90) days from the response due date.
- **No cost reimbursement:** KIPP will not reimburse any Respondent for costs incurred in preparing a Proposal.

- **Pricing and Payment Structure**

- Pricing must be provided using Exhibit B and must be firm for the validity period described above. KIPP will approve and release payments only upon measurable, quantifiable delivery that KIPP can validate and sign off on; milestone payments based solely on the passage of time will not be accepted. Payment amounts associated with each deliverable should be representative of the value that deliverable contributes to the overall engagement.
- **Fixed-Fee Acceptance and Payment**
 - Provide a firm fixed price for each deliverable and acceptance milestone, consistent with the deliverable-based commercial model described above. Hourly or time-and-materials pricing will not be considered for the base scope.
 - Payment will be released only after KIPP has accepted the corresponding deliverable in writing.
 - Vendor staffing, hours, effort estimates, or productivity do not constitute a scope change.

Optional Q&A / Pre-Bid Meeting

Interested Vendors may submit clarifying questions by the date specified in “RFP timing” section. A virtual Q&A session will be held on the date and time specified in “RFP Timing” section. Attendance is encouraged but optional.

Evaluation Process

KIPP's evaluation will generally proceed in the following stages: (1) completeness and compliance review of all Proposals against the requirements of this RFP; (2) evaluation based on submitted proposal by a cross-functional review team; (3) optional shortlisting of finalists for presentations or live demonstrations; (4) reference checks for finalist(s); and (5) final selection and award notification. KIPP reserves the right to request written clarification from any Respondent at any stage, to enter

negotiations with one or more finalists concurrently, and to decline to award a contract at all if no Proposal adequately meets KIPP's requirements.

Exhibit A – Proposal Format Checklist

Use this checklist to confirm your Proposal is complete before submission:

- Executive Summary
- Company Qualifications and Tableau Cloud Migration Experience
- Proposed Team and Key Personnel (Exhibit C)
- Methodology and Approach
- Project Management Approach
- Training and Change Management Approach
- Sample Deliverables
- Assumptions and Exclusions
- 2 References (Exhibit D)
- Vendor Information Form (Exhibit D)
- Signed statement of acceptance of RFP terms
- Pricing, submitted separately (Exhibit B)

Exhibit B – Pricing Form

Complete the table below with your proposed fees by deliverable phase. Add rows as needed. Indicate whether each phase is fixed-fee or time-and-materials, and note any assumptions driving the estimate. Submit this exhibit as a separate file from the rest of your Proposal (Per “Submission Logistics”).

Deliverable Phase	Fee Structure	Estimated Hours	Price (USD)
1. Discovery & Enterprise Inventory (Foundation and Regional sites assessment)			
2. Future-State Architecture (Foundation)			
3. Future-State Architecture (Regions)			
4. Foundation Migration Planning			
5. Foundation Migration Implementation/Execution			
6. Foundation Training and Change Management			
7. Foundation Governance & Operating Model Setup			
8. Foundation Cutover & Go-Live Support			
9. Foundation Hypercare, Post-Migration Support and knowledge transfer			
Total			

Deliverable Phase	Fee Structure	Estimated Hours	Price (USD)
1. Regional Migration Planning			
2. Regional Migration Implementation/Execution			
3. Regional Training and Change Management			
4. Regional Cutover & Go-Live Support			
5. Regional Hypercare & Post-Migration Support and knowledge transfer			
Total			

Exhibit C – Key Personnel List

List the key personnel who will be assigned to this engagement. Provide bios of the individuals who will be assigned to this project, their functions, including any relevant experience for each individual. RACI will be expected in SOW!

Name	Title	Project Responsibility	Qualifications (education, years of experience, relevant prior projects)

Exhibit D – Vendor Information Form

Vendor Address Data

Field	Response
Legal, incorporated name of company	
Street / P.O. Box	
City, State, ZIP	
Website	

Vendor Point of Contact for This RFP

Field	Response
Name	
Title	
Phone	
Email	

References

Provide two (2) reference contacts (name, company, email, and phone) for clients you have served, preferably clients of comparable size and scope to KIPP Foundation, or peer education/nonprofit organizations, including at least one reference for a Tableau Server-to-Cloud migration of comparable scale:

- Reference 1:
- Reference 2: