Request for information compliments of Wipfli LLP

[Entity Name]

Request for Cybersecurity and Information

Technology Assessment

For the period [Date] to [Date]

Inquiries and proposals should be directed to:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please consider sending your completed request for information (RFI) to Wipfli.**

Direct the RFI to Ryan Peasley via email at gfpbd@wipfli.com or via mail at:

Ryan Peasley

Wipfli LLP

10000 W Innovation Dr, Ste 250

Milwaukee, WI 53226

Request for information (RFI) technology assessment

[Entity Name] (the “Organization”) is requesting information from consulting firms and individuals (“Firm” or “Firms”) with extensive experience in providing technology assessment and planning services for not-for-profit charitable organizations. We invite the submission of information to us by [Date], for consideration. A description of the services needed, a background of our organization and other pertinent information follow.

Description of need

The organization is interested in receiving information on how a firm could contribute to the success of our information technology function and systems for overall improvement in our operations, as well as maintain strong security measures, including [ex: client intake, program data management, centralized reporting]. Currently, the information technology function is [managed in-house by our IT staff/outsourced to a technology support vendor]. Based on the increased needs for 1) improved technology to support remote work and program delivery, 2) stronger technology strategies to align with our organizational strategies and 3) improved cybersecurity measures, the organization would like to get an understanding of what a best-practice model can look like for our information technology function and how organizations similar to ours create sustainable technology strategies.

Firms should help us evaluate the ideal model for technology strategies, services and solutions, focusing on the most critical areas of need and taking specific interest in how our technology is utilized currently, what gaps exist and what the roadmap is (including costs and timeline) for moving to a best-practice model.

Desired deliverables

* Prioritized list of cybersecurity, IT and database recommendations
* Network discovery and inventory reports
* IT department structure recommendations based upon current and future organizational goals
* Actionable roadmap, including budget estimates, timeline and level of effort for recommendations
* Formalized presentation of findings to leadership team

Background of [Entity Name]

[Provide a summary of the Organization’s background. Include the official name of the Organization; year of formation; IRS tax exemption code [i.e., 501(c)(3)]; mission, purpose, vision, future, etc.; what the Organization does; and where it’s going.]

Description of information technology department and operations

To provide key insight, the organization has completed the questionnaire included in Appendix A. This is designed to give an initial understanding of our technology operations. We anticipate that firms will have additional inquiries and/or assessment methods to further evaluate our current state and gaps to better articulate a roadmap.

Questions and submission

Firms are encouraged to schedule time with us to ask questions to best understand our needs. Please contact [Name] at [Number] to schedule a time for a discussion. Alternatively, questions can be sent via email to [Email Address].

Organizations should submit the RFI response via email to [Name] at [Email Address] by the submission due date of [Date].

RFI response requirements

To simplify the evaluation process, the organization requires that all responses to this RFI be organized in the manner and format described below:

1. Understanding of our needs

Describe your understanding of the scope of the work to be performed. Restate our key challenges and how your recommendations will help us overcome these challenges.

1. Meeting our needs

Describe how your firm would help us implement a best-practice model for supporting our information technology needs. Please include time frames, the use of staff, areas that will receive primary emphasis and the type of assistance that will be required from the organization’s staff. Finally, discuss the process used by your firm to ensure our organization’s ongoing success, including how change management is applied in the implementation of the solutions and processes.

1. Professional experience

Describe how and why your firm is different from other firms being considered. This should include an explanation of the firm's philosophy, size, structure and qualifications for serving not-for-profit organizations of a similar size and with similar operations. Describe your firm's resources devoted to not-for-profit organizations overall and in the same service niche.

1. Team qualifications

Identify the specific partners, managers and in-charge staff who will be assigned if, based on your firm’s response to this RFI, the organization chooses to engage your firm to implement its recommendations for the development of a best-practice model. Provide their bios, specifying experience relevant to the type of services requested.

1. Fees

Please provide a fixed fee estimate for the available service options.

1. Client references

Include a list of relevant not-for-profit clients that your firm has served within the past three years and furnish the names and telephone numbers of any references we may contact.



questionnaire

Assessment

All information provided below will be used confidentially by Wipfli for the exclusive purpose of developing a proposal for services.

| About your organization |
| --- |
| Name |  |
| EIN/TIN |  |
| Address |  |
| Contact name |  |
| Contact phone number |  |
| Contact email address |  |
| Please attach your current organizational chart or a description of your positions and their relationship to one another. |

| Current technology landscape |
| --- |
| Number of organization locations |  |
| Total number of programs and departments  |  |
| Total number of employees |  |
| Is technology supported by internal IT staff, an outside service provider or both? |  |
| If you have an information technology employee/staff right now, please describe the functions this person completes (including non-IT) and estimate the time allocated to each function annually. | Please include as an attachment. |
| What is your estimated annual IT budget (excluding IT staff salaries)? |  |
| What are your organization’s top technology and cybersecurity goals? |  |
| Do you have a formal information technology and cybersecurity policies and procedures manual or other similar guiding documents?  | Please include as an attachment. |
| Do you have formal information technology documentation, including a network diagram? | Please include as an attachment |
| How many virtual and physical servers does your organization have, and what hypervisor is in use (Hyper-V, VMware)?  | Hypervisor:Virtual:Physical: |
| How many network devices (firewalls, routers, switches, etc.) does your organization have? | Firewalls:Routers:Switches:Other: |
| How many computers does your organization have? |  |
| What cloud-based solutions does your organization use?  |  |
| Please provide a list of all client or program management/intake databases your organization uses. | Please include as an attachment. |
| Please provide any documented procedures your organization uses for data entry or reporting for the listed databases.  | Please include as an attachment |