LiftFund Request for Qualifications Information Technology Plan Update/Assessment

LiftFund will be undertaking the preparation of a Technology Plan Update and Assessment and is seeking responses through this Request for Qualifications (RFQ) from experienced consultants to assist the non-profit with this project. LiftFund is located in San Antonio, Texas. It is a non-profit mission based community business lender and serves thirteen states and the communities in them. LiftFund was founded in 1994 and has provided over $200 million in small business capital to over 16,000 companies. LiftFund has approximately 100 employees with an annual operating budget of approximately $15 million. Technology is a critical component of LiftFund’s growth strategy and it is critical that the organization assess and validate its current practices to remain competitive and have community impact.

LiftFund’s leadership is seeking a firm that will assist the team in developing an Information Technology Plan, with specific IT initiatives identified for further evaluation. These include but may not be limited to establishment of digital records storage, use of technology to improve field staff and management productivity and communication, use of technology to enhance customer experience, use of technology to increase volume, and the expansion of web-based services.

Existing Technology Environment

LiftFund’s Headquarter is based in San Antonio, Texas. There are sixteen (16) locations throughout 13 states including the Datacenter in San Antonio.

Network and Infrastructure:

All locations are connected through MPLS Network and Network Based Firewall with Level3 telecommunication provider. Headquarter and the Datacenter are 100 MB bandwidth for Internet, Data and Voice traffics, other locations are either 10 MB fibers or multiple T1s lines. All remote office locations are connected through WAN connection. Remote users use VPN and connect through the terminal server.

LiftFund’s Infrastructure is 80-90% on premise structure located at the Datacenter location. One or Two applications are cloud based and/or hosted solution with software vendor. LiftFund currently opts Dell Power Edge for physical servers, Equal Logic for SAN Storage, Dell, HP and CISCO for network switches, CISCO and Juniper for routers. Phone system is CISCO Voice Over IP on premise with Contact Center solution. Backup solution is local backup nightly at the Datacenter using AppAssure software; the data is sent off-site at eFolder cloud storage daily or hourly.

Operating System and Software Application:

LiftFund software is almost 100% Microsoft technology. There are 5 physical servers to host 25 virtual machines. LiftFund’s infrastructure is 90% virtualized using VMWare vShpere Standard HA environment. All servers are Windows Server Active Directory platform from 2008 to 2012 R2 Datacenter except the 2 phone servers that are Unix based system. Email based system is Exchange 2013 with outlook as a client based. Microsoft SQL is the main database engine. Backbone applications are Microsoft Dynamics CRM, Navigator and Loan Portfolio Management System. The Microsoft Dynamic CRM platform is set up as a SSL secure web-based application facing Internet for users and clients.
Client workstations and Mobile Devices:

LiftFund is currently adopting thick client workstations, Dell Optiplex 7010 (Intel Core i5 3.4 GHz with 6 GB of Memory). There are 150+ PCs throughout company. Operating Systems are varies from Windows 7 64 bits to Windows Vista 32 bits. About 65% of employees also have mobile devices provided, Lenovo Yoga 3 Pro laptop/tablet with Windows 8.1 Pro O/S with 8 GB of memory along with iPhone and/or MiFi hotspot device to work outside of the offices.

Technology Team and Support

There are 5 IT staffs (Director of IT, 2 programmers, 1 Helpdesk and 1 System Administrator) to support 120+ LiftFund internal users, 18 office locations and 20 Microloan Management System units throughout the U.S with over 400 Active Directory Users. The Infrastructure is also managed through our service provider to monitor and manage both Hardware, network and Software Operating System to help the work load in IT so internal IT staff is focusing on daily operation support and business needs. Software Application projects are being outsourced as needed depending on the technologies and timeframe.

The Scope of Work

LiftFund is seeking a qualification statement from experienced technology and management consultants to update LiftFund’s technology assessment and plan. The consultant will be required to assist LiftFund with an assessment of the existing environment and the development of a roadmap designed to advance an efficient deployment of effective IT assets. The scope of work provided under a contract awarded as a result of this RFQ will include, at a minimum, the following:

1. Review of the existing IT environment
   a. Technology
      i. Hardware infrastructure
      ii. Software – key applications

2. Provision of an acceptable Information Technology Assessment process and facilitation of that process leading to a the creation of a technology roadmap for system improvements and expansion

3. Development of IT Roadmap – Short/medium/long term recommendations with projected budget

4. Written report and personal presentations of results and recommendations to LiftFund key staff

Statement of Qualifications

Statement of qualifications should include:

1. Briefly identify your organizational structure and support resources available to complete the scope of work detailed previously in the RFQ, including similar projects and experience in technology assessments and planning.
2. List the qualifications of key personnel who would be assigned to this project including related experience, education, certifications and professional affiliations.

3. Provide a minimum of two references including names of organizations and phone numbers for recently completed projects of a similar scope.

4. Briefly describe a work plan to develop and lead a technology assessment process and plan for LiftFund with estimated cost for your work.

**Interviews**

Respondents may be required to participate in a meeting with the selection committee to review their response to this solicitation and to assist in the further definition of the scope of work to be completed as a result of this request.

Following the definition of the scope of work, a final selection of the most qualified applicant will be determined and successful negotiations would result in the recommendation of a contract award. LiftFund reserves the right to accept or reject any or all proposals and to waive informalities and irregularities in proposals or qualification procedures, and to accept any proposal determined by LiftFund to be in the best interest of the organization.

**Submission Requirements**

Please submit response via email with RE: Request of Qualifications for Technology Plan Update/Assessment to: Celina Pena, Chief Program Officer, to ITproject@liftfund.com.

Additional information or questions regarding this RFQ may be submitted to Celina Pena at ITproject@liftfund.com and/or cpena@liftfund.com.