



REQUEST FOR PROPOSAL [RFP] FOR IT MANAGED SERVICES

POSTING DATE: July 15^h, 2021

CLOSING DATE: September 1st, 2021

NOTIFICATION DATE: October 15th, 2021

ABOUT TRUFUND

TruFund Financial Services is a US Treasury certified nonprofit Community Development Financial Institution (CDFI) established in 2005 with headquarters in New York City and field offices in Alabama, Louisiana and Texas. TruFund's mission is to help historically disadvantaged individuals and communities create thriving and resilient small businesses and entrepreneurial ecosystems in order to close racial and economic disparities and ensure an inclusive and equitable society.

To fulfill its mission, TruFund provides affordable and responsible, short- and long-term financing to historically disadvantaged small businesses and nonprofits to help them strengthen and grow. We complement our financing activities with robust training programs and outcomes-driven pre- and post-loan advisory services to help small businesses build management capacity and advance toward their goals. Finally, we engage, support and partner with diverse public, private and nonprofit stakeholders to ensure strong and impactful local entrepreneurial ecosystems. TruFund believes that the combination of innovative financing, expert training, targeted advisory support, and ecosystem leadership will help small businesses to thrive, build resiliency and create wealth in historically disadvantaged communities.

SERVICE NEEDS

TruFund is requesting proposals for an IT Managed Services Provider that is able to support approximately 37 staff distributed across four physical offices in New York City, NY; New Orleans, LA; Birmingham, AL; and, Houston, TX. All staff members are currently working remotely but following the pandemic TruFund will likely manage a blended model of both physical in-office and remote work for its staff.

TruFund is posting this RFP as it is growing in scale and complexity. It is increasing in its number of staff and may continue to expand geographically. It is also onboarding new applications such as a new underwriting software as well as applications in the Microsoft 365 environment including Teams and Sharepoint which require specialized knowledge and support as we educate staff and set new protocols for access and use. Managing cyber security risks are also important particularly in the current remote work environment but also as TruFund increases its staff and as internal and external operations are managed increasingly through digital interfaces and in the cloud. A full list of functional needs and desired specializations is provided below. TruFund will select a provider based on the demonstrated ability to address these requirements and cost.

FUNCTIONAL NEEDS

- *Website, portals, including a bracketed advanced cyber security / additional*

- Workstation support
 - Live help desk with unlimited support tickets
 - Fast SLA for most inbound calls
 - Upgrade and replacement assistance: assistance with hardware, software and service quotes
 - Upgrading an application on all computers on the network
 - Configuring new desktops or network devices
 - Configuration of network printers and multi-function devices
 - Upgrading the operating system of any machine
 - Installing server software on a desktop machine
 - Hardware and Software Inventory/Asset Management
- Troubleshooting 3rd party server software that does not include an active support contract with the vendor
- 24x7 Server and Workstation Emergency Alerting
- 24x7 Emergency Troubleshooting and Remote Repair
- Employee security awareness training
- Onsite support for offices in New York City; Birmingham, AL; New Orleans, LA; and, Houston, TX
- Network monitoring and reporting
- Web Host and ISP Support Liaison
- Security monitoring
- Server support
- Incident response
- Compliance monitoring
- Disaster recovery/business continuity
- Patch management
- Antivirus updates and remediation
- Malware updates and remediation
- Spyware updates and remediation
- Backup Monitoring and Management
- Mobile device management
- Multifactor authentication
- A/V technology support
- Technology equipment inventory support
- Support for long term technology strategy planning
- Software licensing control: oversight of automatic renewal of software apps
- 365 support
 - User accounts, 365 Groups
 - Permissions

Request for Proposal: IT Managed Services Provider

- SharePoint (including permissions, document management, versioning, lists, and SharePoint triggers and actions in Power Automate)
- Teams: chat, teams, channels, apps, bots, connectors, meetings, and conferencing; Business Voice; and Teams Live Events
- Project
- Power BI
- AAD management
- Ability to provide additional services specific to cyber security audit, monitoring, planning, and support

DESIRED SPECIALIZATIONS

- Experience working with complex nonprofits
- Orientation toward customer education and capacity building
- Practice of providing customers with reports and documentation, and communicating with customer's leadership and technical staff
- Demonstration that the organization is specialized in the latest Microsoft technology

TO RESPOND

To respond to this RFP, please submit a proposal to TruFund Information Technology Committee at info@trufund.org by September 1st, 2021, 5 pm. Your proposal must include a description of your firm's experience and capacity, a list of services offered in response to TruFund list of functional needs and desired qualifications, and a schedule of fees including a clear explanation of any variable costs.