

Request for Proposal for Information Technology Audit

State Bar of Michigan

(Pre-bid Conference call - January 10, 2019 and Proposal due - January 21, 2019)

Dear IT Consulting Firm,

The State Bar of Michigan is seeking bid proposals from qualified information technology firms to perform an information technology audit (“IT Audit”) beginning on January 31, 2019 and to be completed by March 8, 2019. We seek a comprehensive review and assessment of all information technology at the State Bar of Michigan, including IT architecture, applications, processes, skill sets, and resources utilized, concluding with a report that includes findings and recommendations and a half-day presentation to be given to the State Bar senior management team.

The State Bar is a public body corporate operating under the supervision of the Michigan Supreme Court. It is located in downtown Lansing, Michigan. The State Bar has over 45,000 attorney members, an annual budget of \$11 million, and a staff of 74 FTEs. The in-house IT staff consists of 7.5 staff supported by contractors. Major applications include ASI iMIS (membership), GP Dynamics (finance), GroupWise (e-mail), and Microsoft Office on an in-house server network and cloud-based applications. For further information about the State Bar of Michigan, the State Bar’s strategic plan is located at www.michbar.org/file/generalinfo/pdfs/strategicplanreport17.pdf. Other information about the State Bar can be found at www.michbar.org.

Scope of Services Requested

The scope of the consulting engagement will include review, assessment and recommendations for each of the following areas:

- 1) IT infrastructures – hardware, software, external applications, network and cloud given our size, type of organization, and strategic direction.
- 2) IT resources (in-house staff and regular contractors) – IT organization, skill sets, and IT budget given our size, type of organization, and strategic direction.
- 3) IT application development – project management, scoping, skill sets, development process, documentation, controls, and testing.
- 4) IT controls and security over system and data access.
- 5) Member and public interfaces for effective and efficient e-commerce transactions, including our recent implementation of the e-commerce site for dues transactions.
- 6) IT staff continuity plan, cross training readiness, as well as multiple access to applications and documentation.

Project Start Date, Completion Date, and Deliverables

The project start date will be January 31, 2019 and will be completed by March 8, 2019. The key deliverables will be a report of observations and recommendations addressing the scope required, and also a half-day presentation of the findings and recommendations to the State Bar senior management team in Lansing, Michigan after the report is issued.

Proposal Requirements

Your proposal should include:

1. An overview of your firm
2. The proposed scope and schedule of the engagement
3. Your firm's particular qualifications for this engagement, including specific experience with IT audits
4. Consulting experience with governmental units, associations, and not-for-profit entities
5. Qualifications of the partner(s) and staff who would be assigned to this consulting engagement
6. An estimate of the consulting hours required for the engagement
7. Proposed consulting fee (including any additional costs not part of the consulting fee if any)
8. Payment provisions requested
9. Client references
10. Proof of liability insurance and amount
11. Agreement to sign a confidentiality agreement with the State Bar of Michigan
12. Agreement to indemnify the State Bar of Michigan from any liability resulting from the consultant's work performed during the engagement.

Pre-Bid Conference

A pre-bid conference call will be held on Thursday, January 10, 2019 from 2:00 p.m. to 3:00 p.m. While attendance is not mandatory, any questions submitted after that time must be provided in writing. If you are interested in attending this conference call, please contact us at jhorsch@michbar.org and we will provide the conference call number and passcode.

Successful Proposal - Selection Criteria

The criteria for selection of the successful proposal will include experience with performing IT audits, qualifications, reputation, experience with consulting engagements for similar organizations, and the consulting fee.

Due Date for Proposals

Proposals must be received by 5:00 p.m. on Monday, January 21, 2019. The proposal should be submitted via e-mail in secure PDF format, marked to the attention of James C. Horsch, Director of Finance & Administration, at jhorsch@michbar.org. The State Bar of Michigan reserves the right to accept or reject any and all submitted proposals.

Notification of Successful Proposal and Questions

The State Bar of Michigan expects to notify the firm submitting the successful proposal on January 25, 2019. Selection will be made by the senior management staff of the State Bar of Michigan. Questions regarding this proposal can be addressed during the pre-bid conference.

We look forward to receiving your proposal and discussing this further with you at the pre-bid conference.

Sincerely,

James C. Horsch, CAE, CMA, CFM
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