



California Indian Legal Services Request for Proposal

LegalServer Phase 2 Implementation: Customization, Go Live, & Training Program

RFP issue date:	May 09, 2023
Questions due:	May 16, 2023
Responses emailed:	May 18, 2023
RFP Due date:	May 23, 2023
Notice of decision:	May 30, 2023
Amount:	\$35,000

SUMMARY

California Indian Legal Services (“CILS”) is requesting proposals for a consultant who has experience working with a Pika to Legal Server migration to assist the organization with Go Live (estimated end of July 2023), customization, and creation of a staff training program.

CILS has completed Phase I: data migration, data validations, some module customization, and the Go Live date is set for end of July 2023. The consultant will assist with project management and completing the final implementation stages of Pika migration to Legal Server including:

- Modules - customization of modules.
- Go Live – assistance in the week of Go Live.
- Reports – consultation and creation of report templates for grants compliance and other organizational data needs.
- Training Program - Creation and execution of an in-house LegalServer training program for ongoing staff training and new employee onboarding.
- Troubleshooting

ABOUT CILS

As the only statewide provider of direct and free legal services to indigent Native Americans, Tribes, and organizations and with four offices across the state, CILS serves all 58 counties in California and provides a full range of legal services, across a wide array of projects and programs at various service levels, including advice and counsel, brief services for limited scope or self-representation, and extensive services that may include direct representation in court.

The fundamental purpose of CILS' core work is to provide free legal services to low-income Native American individuals, Tribes, and communities to address key and emerging issues in federal Indian law so that all Tribal communities are safe, healthy, and have sustainable economies. CILS is involved in litigation, development of policy, advocacy, and transactional services to tribes involving economic development and building tribal infrastructure.

CILS is a longtime recipient of Legal Services Corporation (LSC) and Interest on Lawyer's Trust Accounts (IOLTA) grant funding which requires financial eligibility criteria (and other compliance requirements) to be screened in order for clients to qualify and receive free legal services. CILS represents low-income Native Americans, Tribes and Tribal organizations at no-cost and contracts with tribes at a reduced rate to provide legal services.

PURPOSE & OBJECTIVES

The purpose of this work is to increase CILS's organizational capacity to serve its clients and to meet its compliance obligations to its funders with increased effectiveness, efficiency and ease. The selected consultant will assist CILS with the following objectives:

1. The completion of migration from Pika to Legal Server, including all activities related to launching LegalServer:
 - a. Customization of modules
 - b. Support during Go Live
 - c. Report Building
 - d. Troubleshooting and assistance

2. Development of a robust training system to include:
 - a. Assisting a new incoming System Administrator to understand how to utilize the system.
 - b. Development of a CILS specific training program to be used for current

staff implementation, ongoing annual staff training, and onboarding new staff. This should involve:

- c. Development of brief customized training videos for staff to perform key functions in LegalServer.
- d. Production of an easy to update “Desktop Training Manual” using best practices for written, digital and video content, specific to CILS, and for the purpose of assisting staff in the utilization of Legal Server in two areas: User Manual, Intake Manual.
- e. Meetings with System Administrator and core staff as needed for the duration of contract.

PROPOSAL CONTENT

Description of responder

Please provide the following information:

1. Responder’s full legal name
2. Responder’s head office mailing (for billing) and website address.
3. Name, telephone number, email address of the responder’s designated contact person.
4. Expertise of the responder, including the core focus of services
5. Responder’s key staff members.

Understanding of Project

Provide a description of your understanding of the project.

Proposed Services

Provide a description of your capabilities and how you will meet the needs of CILS, including the following components:

1. Describe your Legal Server implementation and module customization. capabilities, including experience with Pika to LegalServer migration.
2. Describe your capabilities on developing a training curriculum and production of a manual. Please describe your experience developing training programs and provide examples of work products, if available.

Requirements

Please ensure your proposal addresses each requirement:

1. Launch of LegalServer (estimated Go-live date end of July 2023) is efficient and on time.
2. Staff are fully trained in how to utilize the various functions of LegalServer;
3. Ability to provide training and troubleshooting for staff.
4. Staff are able to utilize the full functionality of the various modules.
5. A training curriculum, training manual and training videos for key functions are developed, easy to use, and serve as a new staff onboarding tool and

reference guide for current staff.

Proposal Assessment Process and Criteria

All proposals will be evaluated by CILS. Notwithstanding any other provision in the RFP, CILS reserves the right to accept the proposal that it deems in its sole discretion most advantageous and the right to reject any or all proposals without giving any notice or reasons. The proposal having the lowest cost to CILS will not necessarily be accepted.

Proposal Evaluation Criteria

CILS may consider any criteria it desires, including, without limitation, those listed below (not necessarily in order of importance):

- Demonstrated understanding of the project objectives and requirements.
- Professional qualifications, reputation, capability, and experience.
- Ability to address technical, functional and business requirements.
- Cost of the project.
- Quality of the proposal.

Timelines and Milestone Dates

Issue date:	May 09, 2023
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Award issue date:	June 01, 2023
Contract dates:	June 01, 2023 – March 1, 2024

Contacts

Please send completed proposals and all inquiries/questions regarding this RFP via email to:

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Please provide all submissions as PDF attachments to an e-mail.