

**Request for Proposals for  
Case Management System**



*Inland Counties*  
**LEGAL SERVICES**

**ISSUED BY**

Inland Counties Legal Services  
1040 Iowa Ave., Suite 109  
Riverside, CA 92507

**PROPOSAL DUE**

July 24, 2018

# **Request for Proposals**

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## **Request for Proposals (RFP)**

### **1. Description, Purpose, and Objectives**

Inland Counties Legal Services (ICLS) is issuing this Request for Proposal (RFP) for case management software to solicit responses from qualified vendors to install and implement a state of the art case management system for legal services.

The purpose of this project is to update our case management system to improve the operation of our legal program. The case management system must be compatible with AbilaMIP Fund Accounting and HR module. This project entails the following:

- General Case Management Tools
- Integrated Search
- Page Level Customization
- Field Management & Creation
- Client Intake & Qualification
- Timekeeping
- Grant Management
- Calendar and Scheduling
- Reports
- Pro Bono Management
- Communication and Contracts
- Non-Client Matters
- Fundraising
- Administrative Tools
- System Training

The successful vendor will contract with ICLS to install, implement and provide training to ICLS staff.

### **2. Background of Organization**

Inland Counties Legal Services (ICLS), is a 501(c)(3) non-profit legal services organization celebrating 60 years of providing free legal services in civil cases to low-income clients in the San Bernardino and Riverside Counties of Southern California since 1958. ICLS is seeking bids to install a new or update our current Case Management System KEMPS, to improve and expand the ability of our system.

The new or upgraded system will be set up at ICLS and our three PAI Subgrantees, located in San Bernardino and Riverside counties.

### **3. Budget and Timeline**

Proposals are open from July 3, 2018, through July 17, 2018. A vendor will be selected by July 20, 2018. Work on this project is scheduled to begin by as soon as possible. A working version of the case management system must be complete and ready for in-house testing by November 15, 2018. The final system must be ready to launch no later than December 31, 2018.

Maximum budget for the contract is \$100,000.

### **4. Format for Proposals (Response Requirements)**

All proposals must adhere to the format below.

1. Vendors name, address, telephone number, email and a description of the vendor's legal status, e.g., corporation, sole proprietor, etc.
2. A statement that guarantees that the response constitutes a firm offer valid for sixty (60) days following receipt and that ICLS may accept the offer any time within the 60 day period
3. Detailed timeline for the project, Project Budget Estimates and Cost Projections including:
  - Provide a breakdown of all costs associated with the project
  - Identify and additional expenses, fees, etc. that you will require to complete the project
4. State whether the vendor has been a party in any litigation during the past five (5) years. All such incidents except employment-related cases must be described, including the party's name, address and telephone number. Present the vendor's position on the matter.
5. Provide two (2) references (with phone and email contact) for other case management systems you have completed or participated in installing. If you have not completed or participated in any case management system projects, please indicate this and provide two (2) references for other related projects you have completed.
6. Resumes/CVs for the project manager and all personnel that will work on this account detailing relevant qualifications.

### **5. Evaluation Process**

ICLS will respond to any questions you may have regarding this project until proposals are due on July 24, 2018. Please email inquiries to [atoerge@icls.org](mailto:atoerge@icls.org). We will respond within a 72 hour.

Our staff will review proposals, conduct interviews, and select a vendor by July 20, 2018, with work to begin shortly after that. The selected vendor will be expected to enter into a contract with ICLS. Vendors whose responses are not chosen for further negotiations or award will be notified via email.

## **6. Terms and Conditions**

*All work performed is “work for hire,” and all property rights will be owned by ICLS, its successors, and assigns.*

**DEADLINE: Proposals must be delivered via email to Amanda Toerge at [atoerge@icls.org](mailto:atoerge@icls.org) and Dianne Woodcroft at [dwoodcroft@icls.org](mailto:dwoodcroft@icls.org) no later than 5:00 PM on July 24, 2018. All proposals must include a statement of authorization to bid signed by the executive director of the company that is bidding. All RFP’s must use the proposal format stated in the RFP. Bidders must disclose any relevant conflicts of interests or pending lawsuits and debarments. Bidders must provide a statement that guarantees that the response constitutes a firm offer valid for sixty (60) days following receipt and that ICLS may accept the offer any time within the 60 day period.**