

**Request for Proposals for  
LegalServer Integration with SharePoint**



**ISSUED BY**

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

**PROPOSAL DUE**

August 16, 2021



## **Inland Counties Legal Services, Inc. (“ICLS”) Request for Proposal for LegalServer Integration with SharePoint**

**Overview:** ICLS is a nonprofit law firm offering free civil legal services to low income clients living in Riverside and San Bernardino Counties. ICLS has 5 physical offices, outreach intake at community partner locations, and telecommuting opportunities for staff. ICLS currently has 105 employees and up to 30 volunteers throughout the year. ICLS’ general office hours are 8:30am – 5:00pm Monday through Friday. As a grantee of the Legal Services Corporation (LSC), ICLS is subject to its reporting and compliance requirements. Note that all contracts entered into by ICLS in excess of \$25,000.00 may require prior written approval from LSC before signing or beginning any work.

### **1. PURPOSE AND DESCRIPTION:**

- 1.1 Purpose:** ICLS is requesting proposals to integrate its case management system, LegalServer, with Microsoft SharePoint via LegalServer’s integration module.
- 1.2 Goal:** To establish a uniform digital file maintenance structure integration ICLS’ Case Management System (CMS), LegalServer, and Microsoft SharePoint. ICLS began using LegalServer as its CMS in 2019, after transitioning from Kemps Prime. Microsoft 365 utilization began in January 2020, with the entire program utilizing available apps and platforms under E3 licenses in March 2020.
- 1.3 Timeline for Completion:** The PRODUCT is to be completed by December 31, 2021.
- 1.4 Payment:** Successful bids must not exceed \$ 20,000.00.

### **2. RFP ADMINISTRATION AND INSTRUCTIONS TO VENDORS:**

- 2.1. RFP Coordinator:** Upon release of this RFP, all vendor communications concerning this acquisition must be directed to the RFP Coordinator listed below. Any oral communications will be considered unofficial and nonbinding on ICLS. Only written statements issued by the RFP Coordinator may be relied upon.

Tessie Cross, Deputy Director of Operations  
Inland Counties Legal Services  
1040 Iowa Ave., Suite 106  
Riverside, CA 92405  
Email: [tcross@icls.org](mailto:tcross@icls.org)  
Telephone: 888-245-4257 ext. 4524  
Cellphone: 909-419-6256

- 2.2. RFP Schedule:**

**RFP Issued:** July 26, 2021

**Proposal Submission:** via email to Deputy Director of Operations, Tessie Cross, [tcross@icls.org](mailto:tcross@icls.org) by midnight PST August 16, 2021

**Evaluation period:** August 17, 2021 – August 19, 2021

**Successful Bidder Notification:** no later than August 20, 2021

**2.3 Work Schedule:**

Work to commence by September 1<sup>st</sup>, 2021, or upon signing of contract by both parties, whichever occurs first. Project to be completed by December 1, 2021.

**2.4 Vendor Questions:** Vendors must contact the RFP Coordinator by email at the email address listed in Subsection 2.1 above with any questions concerning this RFP.

**2.4.1 Pre-Qualification:** All bidders must contact the RFP Coordinator prior to submitting a bid in order to be pre-qualified. All initial questions must be accompanied with, at a minimum, the information required in Exhibit A question number 1 in order to be pre-qualified to receive a bid packet and engage in Q&A regarding the bid.

**2.4.2 Bid Packets:** Vendors who comply with 2.4.1 will receive will be added to a Yammer channel where they will have access to a bid packet and can engage in Q&A with the RFP Coordinator and see all other vendors' Q&A.

**2.4.3 All questions** subsequent to a vendor's initial question must be asked on the Yammer channel prior to the response due date and time listed in Subsection 2.2 above.

**2.5 Response Time and Format:** The proposal must be sent electronically via email in Adobe PDF format to the RFP Coordinator designated in Section 2.1 of this RFP. The email subject should be clearly marked "ICLS LegalServer Integration with SharePoint RFP".

**2.5.1 Vendor Response:** The vendor's response, in its entirety, must be received by the RFP Coordinator in Riverside, CA, in accordance with the schedule contained in Subsection 2.2 above. Late responses will not be accepted and will be automatically disqualified from further consideration. Vendors should allow enough electronic delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Vendors assume the risk for any email delay problems.

**2.5.2 Proposal Length:** Proposals that exceed 20 pages in length (excluding charts and graphs) will not be accepted. Late proposals will not be accepted and will be automatically disqualified from further consideration.

**2.6 Response Requirements and Content:** Vendors must respond to each question/requirement contained in Exhibit A, Vendor Response. In preparing their response, vendors should restate each requirement and then give their response.

**2.7 Costs of Preparing Responses:** ICLS will not pay any vendor costs associated with preparing responses, submitted in response to this RFP.

- 2.8 Responses Property of ICLS:** All responses, accompanying documentation and other materials submitted in response to this RFP shall become the property of ICLS and will not be returned.
- 2.8.1 Proprietary Information/Public Disclosure:** All responses received shall remain confidential until the evaluation is completed and the vendor has been selected and approved. Thereafter responses shall be deemed public records.
- 2.9 RFP Amendments/Cancellation/Reissue/Reopen:** ICLS reserves the right to change the RFP Schedule or issue amendments to this RFP at any time. ICLS also reserves the right to cancel or reissue the RFP. All such actions will be posted on ICLS's website.
- 2.10 Minor Administrative Irregularities:** ICLS reserves the right to waive minor administrative irregularities contained in any response.
- 2.11 Inability to Enter Contract:** ICLS reserves the right to eliminate from further consideration any vendor that ICLS, because of legal or other considerations, is unable to contract with at the time responses are due in accordance with the schedule contained in Subsection 2.2 above.
- 2.12 No Obligation to Enter a Contract:**
- 2.12.1** The release of this RFP does not compel ICLS to enter any contract.
- 2.12.2** ICLS reserves the right to refrain from contracting with any vendor that has responded to this RFP regardless of whether the vendor's response has been evaluated and regardless of whether the vendor has been determined to be qualified. Exercise of this reserved right does not affect ICLS's right to contract with any other vendor.
- 2.12.3** ICLS reserves the right to permit an interview with any vendor and/or a demonstration from any vendor prior to entering a contract with that vendor. If a vendor declines the request for an interview or demonstration for any reason, the vendor may be eliminated from further consideration.
- 2.13 Multiple Contracts:** ICLS reserves the right to enter contracts with more than one vendor as a result of this RFP.
- 2.14 Non-Endorsement:** The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to ICLS in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of ICLS.
- 2.15 Contract Payment Limitations:** Vendors should anticipate payment at the end rather than the beginning of the invoice period in which they provide services or after they submit any deliverable for which a payment is due.

### **3. RFP EVALUATION:**

- 3.1 An ICLS Evaluation Team (Team) of at least two (2) people will evaluate the responses to this RFP. The Team may also consider past contract performance and check references beyond those listed in the vendor's response.
- 3.2 As part of the evaluation process, at the discretion of the Team, vendors may be asked to clarify specific points in their response. However, under no circumstances will the vendor be allowed to make changes to the response.

#### 4. POST EVALUATION

- 4.1 **Notification of Selection of Successful Vendor:** The successful Vendor and Vendors whose responses have not been selected for further negotiations or award will be notified via email on or August 10, 2021.
- 4.2 **Contract Award/General Terms and Conditions:** ICLS may be required to obtain prior approval from the Legal Services Corporation (LSC). This process can take a minimum of sixty (60) days from submission of request for approval. Once approval is received, ICLS will notify the successful vendor to begin services. A vendor selected to provide application services will be expected to enter into a contract with ICLS on or before August 13, 2021.
- 4.3 **Appeals:** Requests to appeal the rejection of a bid must be made to the RFP Coordinator in 2.1 above by email as soon as possible after the announcement of the award.
  - 4.3.1 **Time is of the essence** in requesting an appeal as a contract may be signed prior to the contract deadline in 2.2 above.
  - 4.3.2 **Compelling Business Reason** Requests for an appeal must set out a compelling business reason why the appeal should be considered.
  - 4.3.3 **Discretionary Consideration:** Appeals of bid rejections may be accepted or rejected at the sole discretion of ICLS management.

**ICLS' LegalServer Integration with SharePoint RFP**  
**EXHIBIT A - VENDOR RESPONSE**

Responses must contain the following information in the following format. Please number your responses to correspond with the information requested here.

1. Vendor's name, address, federal tax identification number or Social Security Number (SSN), Uniform Business Identifier (UBI) number, and a description of the vendor's legal status, e.g., corporation, sole proprietor, etc. Additionally, if applicable, address of corporate headquarters, state of incorporation and business insurance information.
2. Vendor's contact name, telephone number, fax number and email.
3. A statement that guarantees that the response constitutes a **firm offer** valid for sixty (60) days following receipt, and that ICLS may accept any time within the 60-day period.
4. A statement on whether the vendor or any employee of the vendor is related by blood or marriage or current or former business association to an ICLS employee or resides with an ICLS employee. If there are such relationships, list the names and relationships of said parties. Include the position and responsibilities within the vendor's organization of such vendor employees.
5. 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 other parties' name, address, and telephone number. Present the vendor's position on the matter.
6. Provide two (2) references for programs for other LegalServer projects you have completed. Provide references of customers only of similar size, scope, and service offerings. Please include a phone number or email address of the referenced customer and contact so he/she may be contacted. Also, provide a sample contract or service agreement.
7. Executive overview of proposal.
8. Resources used to implement the project.
9. List of costs NOT included in the proposal ("project work") that ICLS should expect to effectuate integration, if any.
10. Provider should comment on their ability to meet PCI, PHI, HIPPA, and other compliance requirements.
11. Describe your implementation plan for LegalServer integration with SharePoint including possible transition plan, timeline of system implementation, dedicated staffing assignments, project manager and defined tiers/levels of support.
12. Provide a price proposal and include any criteria for pricing changes, including any nonprofit pricing. Define what is in scope and what would be considered project/out of scope services. Provide pricing for both.

13. If selected, the vendor shall secure at its own expense and keep in effect during the term of the contract with ICLS either comprehensive general liability insurance with broad form ICLS endorsement or commercial general liability insurance naming ICLs as an additional insured with an amount not less than \$1,000,000 combined single limit per occurrence, and \$2,000,000 aggregate; workers compensation and employee liability coverage of no less than \$500,000.