



California Indian Legal Services

Case Management Software Request for Proposal

Issue date: May 11, 2022

Due date: May 25, 2022

1. Invitation

California Indian Legal Services (“CILS”) is inviting proposals for the provision of case management software (“CMS”).

2. Introduction

CILS is seeking proposals for a new case management system and associate implementation services to provide improved automation capabilities including access to information, accuracy of data and reporting to support our mission to protect and advance Indian Rights, foster Indian self-determination, and facilitate Tribal nation building. 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. Our goal is to increase and provide direct legal services that will help our low-income clients achieve positive outcomes that measurably improve the quality of their lives and help them address issues unique to their status as Native Americans and sovereign tribal governments. To accomplish this, CILS 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. Therefore, it is critically important for CILS to streamline its intake and case management processes by migrating and implementing an efficient new CMS.

3. Background

CILS is currently using an outdated CMS named Pika and is seeking to initiate and complete a migration from Pika (currently hosted with Linode) to a new updated CMS. The staff time saved through adopting a more advanced CMS will go directly to serving

more clients in the indigent and vulnerable Indian communities throughout California who critically need our legal services while ensuring compliance as required by CILS' funders.

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.

4. Scope and Objectives

The purpose of this Request for Proposals (RFP) is to select a qualified CMS provider, implement the software, migrate existing data from Pika, deliver training to staff, and provide ongoing support to users. Initial provision involves __4__ locations in California, with approximately __40__ internal staff users and __4__ external (volunteers, contract attorneys) users. The intent of the overall project is to improve both client access and service delivery to California Native American communities by deploying a more sophisticated CMS.

5. Proposal Content

5.1 Description of responder:

Provide the following:

- a. Responder's full legal name;
- b. Responder's head office mailing (for billing) and website address;
- c. Name, telephone number, email address of the responder's designated contact person;
- d. Expertise of the responder, including the core focus of services provided by the responder;
- f. Responder's key staff members;

5.2 Understanding of Project:

Provide a description of:

- a. Responder's understanding of the project;

b. Responder's added value and differentiation;

5.3 Technical Requirements:

Provide a description of the proposed product including the following components:

- a. Provide a brief overview of your products, including a summary of functionality, with screen shots where applicable.
- b. Describe your customization and extensibility capabilities.
- c. Describe how the system can be modified once live.
- d. Describe your security practices.
- e. Do you offer your products as Licensed (on premise) or Hosted (in cloud)

5.4 Business Requirements for CMS:

The following are the desired business functions for the CMS. Please ensure your proposal addresses each requirement:

- User-friendly/Intuitive: Easy to use and navigate;
- Ability to set up user permissions based on office and user role;
- Ability to configure and make changes internally;
- Intake system with conflict check;
- Workflow;
- Tasks, To-Do lists, Assignments, shared calendar, reminders;
- Mobile access;
- Timekeeping;
- Search;
- Grant management including compliance;
- Calendar;
- Online intake capabilities;
- Reporting capabilities (management and grant reporting);
- Any integration options (Office 365, SharePoint, VOIP, etc);
- Measure and report on case outcomes;
- Document management;
- Contact management
- Pro bono management
- Contract attorney management

5.5 Deployment Plan, Training and Support:

Provide detailed descriptions of:

- a. Outline of deployment methodology including a timeline and a monthly progress report template;
- b. Outline/approach for data migration;
- c. Outline for staff training and user testing;

d. Ongoing support.

5.6 Pricing

- a. Initial acquisition price
- b. Provide pricing for migrating 100 of fields from Pika database.
- c. Provide pricing for migrating per Gigabytes of documents.
- d. Provide pricing for migrating per Terabytes of media (video, audio, pictures).
- e. Describe ongoing costs for hosting or maintenance, per Gigabytes/Terabytes of data.
- f. Describe any additional ongoing support costs.

6. 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):

- a. Demonstrated understanding of the project objectives, scope, requirements.
- b. Professional qualifications, reputation, capability, and experience.
- c. Ability to address technical, functional and business requirements.
- d. Cost of the project, including the projected yearly annual costs.
- e. Quality of the proposal.

8. Timelines and Milestone Dates

Request for Proposals issued: 5/11/22

Request for Proposals due: 5/25/22

Questions from responders due: 5/18/22

Questions answered by CILS: 5/12/22-5/20/22

Vendor demonstrations: 5/30/22 – 6/2/22

Award date: 6/6/22

Contract date: 6/15/22

Project start date: 7/1/22

Desired completion date: 12/31/22

9. Contacts, Inquiries, Clarifications and Submission Please send completed proposals and all inquiries/questions regarding this RFP via email to:

Leann Ferry
Direction of Administration
California Indian Legal Services
117 J Street, Suite 201
Sacramento, CA 95814
rfp@calindian.org

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