



Request for Proposals (RFP)
SharePoint Migration & LegalServer Integration Project
Legal Aid Society of Mid-New York, Inc.
Date Issued: October 1, 2025
Submission Deadline: November 14, 2025

Overview

The Legal Aid Society of Mid-New York, Inc. (LASMNY) is a Legal Services Corporation (LSC)- funded, not-for-profit organization headquartered in Utica, New York. We serve thirteen counties in central New York with six offices and a telephone HelpLine. We also operate a statewide program serving agricultural workers and their families. As part of its strategic modernization efforts, LASMNY seeks to enhance its document management infrastructure through a SharePoint migration and LegalServer integration.

Organizational Background

Established in 1952, LASMNY's mission is to provide free legal assistance to low-income people facing civil legal problems that impact the basic needs of life. Through legal advice, emergency legal services, extended legal representation, and community legal education, we help low-income people stabilize their finances, protect themselves and their children from domestic violence, obtain access to healthcare and education, avoid homelessness through wrongful evictions, protect the family home from foreclosure, and increase household income. We also focus on specific vulnerable populations with our services, such as senior citizens, victims of domestic violence and sexual assault, people with disabilities, refugees, and immigrants.

Project Objectives

LASMNY is soliciting proposals from qualified vendors to:

1. Migrate case-related documents from legacy network drives to SharePoint.
2. Reorganize and standardize file structures to maximize efficiency.
3. Develop SharePoint intranet capabilities for offices and practice groups.
4. Integrate SharePoint with LegalServer.
5. Provide training, documentation, and post-implementation support.
6. Establish a foundation for ongoing system maintenance.

Scope of Work

A. Discovery & Planning

1. Conduct a comprehensive review of LASMNY's existing network shares.
2. Identify case files eligible for migration (pending or closed after January 1, 2023).
3. Assess data volume, structure, security protocols, and access needs.
4. Collaborate with LASMNY to define a SharePoint taxonomy and metadata schema.
5. Document findings and recommendations in a Discovery Report.

Main Office: 120 Bleecker Street, Utica, NY 13501
www.lasmny.org

B. SharePoint Design & Configuration

1. Create SharePoint sites and structure tailored to LASMNY's office and practice group structure.
2. Configure user permissions.
3. Stage and clean data for migration.
4. Configure LegalServer integration to enable seamless access to SharePoint folders.
5. Implement metadata synchronization to support intuitive file identification.
6. Conduct internal testing and provide configuration documentation.

C. Data Migration

1. Migrate eligible case-related documents using a third-party migration utility.
2. Ensure integrity, security, and traceability of migrated data.
3. Validate successful migration through sampling and reconciliation.

D. Testing & Refinement

1. Facilitate user acceptance testing (UAT) with LASMNY stakeholders.
2. Implement up to two rounds of minor refinements based on UAT feedback.
3. Document all changes and final configurations.

E. Training & Documentation

1. Develop concise, plain-language documentation for end-users and administrators.
2. Include annotated screenshots, diagrams, and step-by-step instructions.
3. Conduct virtual training sessions tailored to different user roles.
4. Provide at least one round of revisions to documentation based on LASMNY feedback.

F. Implementation & Support

1. Address technical issues, user questions, and minor adjustments.
2. Maintain clear communication with LASMNY staff.

G. Optional: Ongoing Maintenance

1. Propose a support agreement for ongoing support and maintenance.
2. Include options for troubleshooting, updates, and enhancements under a separate scope.

Project Timeline

The project is expected to begin no later than the first quarter of 2026. Vendors should propose a detailed timeline covering:

1. Discovery and planning
2. Configuration and migration
3. Testing and refinement
4. Training and go-live
5. Post-implementation support

Budget Parameters

The budget for this project cannot exceed \$75,000.00. Proposals should include:

1. A budget estimate for the project (not to exceed \$75,000.00).
2. Hourly rates by role (e.g., Technician, Consultant, Engineer, Project Manager)
3. Estimated hours per task or phase
4. Any anticipated third-party costs
5. Terms for overtime or additional scope requests

Proposal Submission Requirements

Proposals must also include the following:

1. A statement outlining interest and qualifications.
2. A project work plan and timeline
3. Resumes of key staff members
4. At least two references from similar projects (preferably for legal aid or nonprofit organizations)

Questions and Additional Information

Please email questions or requests for additional information to rfp@lasmny.org by **5:00 p.m. EST on November 3, 2025**.

Submission Instructions

Please email your proposal in Portable Document Format (PDF) to rfp@lasmny.org by 5:00 p.m. EST on November 14, 2025. Include "LASMNY SharePoint Migration & LegalServer Integration Proposal – [Your Organization Name]" in the subject line.

Proposals received after 5:00 p.m. EST on November 14, 2025, may not be considered.

Selection Criteria

LASMNY will evaluate proposals based on:

1. Understanding of Scope (25%)
2. Relevant Experience (LegalServer/SharePoint) (20%)
3. Technical Approach (20%)
4. Cost and Value (15%)
5. Project Timeline (15%)
6. References (5%)

Additional Terms

LASMNY reserves the right to request additional information or clarification. LASMNY may negotiate scope, pricing, and terms with selected vendors. This RFP does not commit LASMNY to award a contract or pay any costs incurred in proposal preparation.