

Request for Proposal (RFP): Technology Assessment (Phase I)

Organization: Community Legal Services (CLS)

Date of Issue: October 13, 2026

Proposal Due Date: October 23, 2026

Project Completion Date: December 18, 2026

1. Introduction & Project Overview

Community Legal Services (CLS) invites proposals from qualified vendors to conduct Phase I of a multi-phase technology, systems, and processes assessment. This foundational research and discovery phase is designed to evaluate CLS's current software infrastructure to determine its capacity to support our mission and long-term growth. Specifically, the assessment will identify opportunities to streamline processes and pinpoint the tools required for future scalability. This initial phase serves as preparation for a larger, global assessment scheduled to begin in 2027, which will be managed through a separate RFP. Vendors selected for Phase I will be eligible to apply for the Phase 2 project.

2. Scope of Work

The selected vendor will conduct an initial assessment to document the current state of CLS's technology landscape. The scope includes, but is not limited to:

- **Software Cataloging:** Documenting all current core software systems. Key systems currently in use include, but are not limited to, NetSuite, LegalServer, Office365, and Virtuous.
- **Integration Mapping:** Document which systems could talk to other systems and identify the projected difficulty of integrating these systems.
- **Process Mapping:** Identifying and documenting existing workflows and processes tied to these systems. For this initial research phase, we understand that process mapping will be cursory.
- **Stakeholder Identification:** Identifying the key personnel and stakeholders who must be involved in the subsequent, larger-scale global assessment.
- **Gap Analysis:** Providing preliminary observations on whether current tools meet the needs of the organization's growth and scaling objectives.

- **Challenge Identification:** Considering the larger project, provide any predicted challenges that CLS will need to address or contend with either during the project or prior to moving forward with the full-scale tech assessment.
- **Phase II Scoping:** Provide a recommendation of what the Scope of Work for the larger project should include, a list of required technical expertise, and timeline for the full assessment.

Note: Experience with at least one of our core systems (NetSuite, LegalServer, Office365, and Virtuous) is highly preferred.

3. Deliverables

The primary output of this project is an Assessment Report and Recommendation Plan. This document must include:

1. A summary of current systems and identified processes.
2. A list of identified stakeholders for the next phase of the project.
3. A strategic recommendation on how to execute the larger global assessment and process review.
4. A proposed roadmap for the subsequent phase, including recommended involvement levels of staff and external experts.

4. Timeline

CLS will adhere to the following schedule:

Milestone	Date
Proposals Due	October 23, 2026
Award Announcement	October 30, 2026
Projected Start Date	November 2, 2026
Project Completion	December 18, 2026

Questions will be accepted to clarify the RFP requirements or expectations. Questions will not be published. CLS will not take meetings with prospective vendors prior to receiving a proposal. Questions can be directed to Eli Mattern at elim@clsmf.org.

5. Budget

The total budget for this initial assessment phase is up to \$40,000. Proposals should include a detailed breakdown of expenses and payment timeline. CLS does not automatically hire the lowest bid, instead we weigh the vendor's credentials, project plan, and cost to decide who would be the best partner.

6. Proposal Requirements & Submission

To ensure a fair and efficient review process, all proposals must adhere to the following constraints:

- **Length:** Proposals must be less than three (3) pages total, including all attachments, resumes, and references.
- **Content:** Proposals should include a brief overview of the vendor's experience, a proposed methodology for this specific scope of work, a timeline for completion, and a cost breakdown.
- **References:** Please include references from similar projects (preferably within the legal or non-profit sectors).

Submission Instructions:

Please submit your proposal in PDF format to Eli Mattern at elim@clsmf.org no later than 4:00 PM on October 23, 2026. Please use the subject line: "Proposal Submission – Tech Assessment Phase I – [Your or your company's name]".

7. About Our Program

Community Legal Services (CLS) is a nonprofit legal aid organization serving twelve counties in Central Florida. We receive over 100,000 requests for civil legal assistance every year on issues such as family law, consumer protection, housing related matters, and many more. In the last two years, CLS has grown from a staff of 150 to over 200 employees. This project and the next phase of the assessment is part of CLS' improvement plan as we continue to grow as a mission driven organization.