Request for Proposals

LegalServer Review, Configuration, Implementation, and Training

1. Purpose and Background

Dakota Plains Legal Services (DPLS) is seeking proposals from qualified consultants to assist with the review, configuration, implementation, and optimization of its LegalServer case management system.

This project is supported through a Technology Improvement Project (TIP) grant awarded by the Legal Services Corporation (LSC). The project is intended to improve DPLS's technology infrastructure, strengthen operational efficiency, and enhance case management, centralized intake, grant administration, and reporting capabilities.

The selected consultant will work with DPLS leadership and staff to complete three primary project objectives:

1. Review existing LegalServer workflows and grant management processes and develop a detailed implementation plan.
2. Configure and implement LegalServer 5 upgrades, centralized intake enhancements, and Advanced Grant Management functionality.
3. Train staff, document optimized workflows and procedures.

The consultant is expected to provide hands-on assistance throughout the project, from initial assessment and planning through implementation, staff training, and project closeout.

2. Scope of Services and Project Objectives

Objective 1: Conduct Review of LegalServer and Develop an Implementation Plan

The consultant will assess DPLS's existing LegalServer environment, centralized intake workflows, and grant management processes. The review will identify areas for improvement and establish a detailed plan for implementing LegalServer 5 upgrades and Advanced Grant Management (AGM).

Services will include:

- Review existing LegalServer configurations, workflows, forms, reports, user roles, and system functionality.
- Assess current intake procedures, eligibility screening, application processing, case assignment, and referral practices.

- Evaluate existing and proposed centralized intake workflows and identify opportunities for improved consistency and efficiency across DPLS offices.
- Review current grant management processes, including grant setup, budgeting, staff allocations, expenditures, reporting, and compliance tracking.
- Assess existing financial and grant reporting processes and identify opportunities to improve accuracy, efficiency, and integration with LegalServer.
- Identify system configuration needs, workflow gaps, reporting limitations, and opportunities to reduce duplicate data entry.
- Develop a detailed implementation plan outlining recommended configurations, workflows, priorities, project milestones, responsibilities, and timelines for LS5 upgrades, centralized intake enhancements, and AGM implementation.

Required Deliverable: A written assessment of DPLS's current LegalServer environment and a detailed implementation plan addressing the three project components.

Objective 2: LegalServer 5 Upgrades and Workflow Enhancements

Based on the assessment and approved implementation plan, the consultant will configure and implement LegalServer 5 upgrades, centralized intake enhancements, and AGM functionality.

Services will include:

LegalServer 5 Upgrade

- Assist with planning and implementing the transition to LegalServer 5.
- Review and optimize existing system configurations, workflows, forms, reports, and user roles.
- Configure system functionality to support DPLS's operational and reporting needs.
- Test system functionality, identify issues, and assist with troubleshooting before and after implementation.

Centralized Intake Enhancements

- Configure and implement centralized intake workflows within LegalServer.
- Improve application processing, eligibility screening, intake forms, case routing, and case assignment functionality.
- Establish consistent procedures that support intake across DPLS offices (8) and service areas.
- Configure appropriate reports to monitor applications, eligibility determinations, referrals, and case assignments.
- Test and support implementation of the centralized intake process.

Advanced Grant Management

- Configure and implement AGM functionality to support grant administration and oversight.

- Assist with establishing grant structures, funding categories, budgets, staff allocations, and reporting requirements.
- Configure workflows and reports to support grant tracking, expenditures, performance measures, and compliance.
- Evaluate and improve the relationship between LegalServer case data, AGM, and financial reporting processes.
- Test and validate AGM functionality before implementation.

Objective 2 deadline: Required Deliverable: Successfully configured, tested, and implemented LegalServer 5 upgrades, centralized intake enhancements, and AGM functionality in accordance with the approved implementation plan.

Objective 3: Training, Documentation, and Grant Reporting

The consultant will ensure DPLS staff are prepared to use the updated system and that project improvements are documented and sustainable.

Services will include:

Staff Training

- Develop and deliver training on LegalServer 5, centralized intake workflows, and AGM functionality.
- Provide role-specific training for administrators, management, intake staff, attorneys, paralegals, and other applicable users.
- Provide hands-on instruction and opportunities for staff to practice using the updated system.
- Provide post-implementation technical assistance and troubleshooting.

Documentation

- Document optimized workflows, system configurations, and procedures.
- Develop user guides, reference materials, and written instructions for newly implemented functions.
- Document centralized intake procedures and AGM processes to support consistent use across DPLS offices.
- Provide DPLS with documentation necessary to maintain and manage the updated system after the consulting engagement concludes.

Grant Reporting

- Assist DPLS with identifying and compiling project information necessary to document completed activities, milestones, and outcomes.
- Provide documentation of system configurations, implementation activities, staff training, and completed deliverables.

Required Deliverables: Completed staff training, written workflow and procedure documentation, training materials, and information and assistance necessary to complete required TIP grant reporting.

3. Project Management and Coordination

The consultant will work collaboratively with DPLS leadership and designated staff throughout the project. The consultant's proposal should include a project schedule with milestones, estimated completion dates, and anticipated staff involvement.

The consultant will provide regular progress updates, identify potential delays or implementation challenges, and obtain DPLS approval of major configuration and workflow decisions before implementation.

The consultant should coordinate the LS5 upgrade, centralized intake enhancements, and AGM implementation to ensure the functions work together effectively and support DPLS's overall operational and reporting needs.

4. Consultant Qualifications

Proposals should demonstrate:

- Experience configuring, implementing, and supporting LegalServer.
- Demonstrated knowledge of LegalServer 5 upgrades and implementation.
- Experience designing and implementing centralized intake processes.
- Experience with Advanced Grant Management or comparable grant management systems.
- Knowledge of grant administration, financial reporting, and compliance requirements.
- Experience providing technical training and documentation to nonprofit or legal aid organizations.
- Familiarity with Legal Services Corporation requirements is preferred.

5. Proposal Requirements

Proposals should include:

- Consultant or company background and contact information.
- Relevant experience and qualifications, including LegalServer, LS5, centralized intake, and AGM.
- Proposed approach for completing each of the three project objectives.
- Identification of project team members and their roles.
- Proposed project schedule, milestones, and estimated completion dates.
- Description of implementation, testing, training, and documentation services.
- Description of post-implementation support.
- Itemized cost proposal, including hourly rates, estimated hours, total project cost, travel expenses, and any optional services.

- At least three professional references for comparable projects.
- Disclosure of any potential conflicts of interest.

6. RFP Schedule and Submission

DPLS anticipates the following schedule:

- RFP Issued: 11/17/2026
- Questions Due: 12/01/2026
- Proposals Due: 12/14/2026
- Consultant Selection: 12/21/2026
- Anticipated Project Start: 01/01/2027
- Project Completion Date: 03/31/2028

Proposals should be submitted electronically to:

Jana Gray
Director of Development & Special Projects
Dakota Plains Legal Services
jgray@dpls.org

Subject Line: LegalServer Consulting RFP

7. DPLS Rights

DPLS reserves the right to reject any or all proposals, request additional information, negotiate scope and fees, modify or cancel this RFP, and award all or part of the requested services. DPLS will not reimburse costs incurred in preparing or submitting proposals.

8. Expected Project Outcomes

At the conclusion of the project, DPLS expects to have:

- A reviewed and optimized LegalServer environment with LegalServer 5 upgrades implemented.
- Improved and standardized centralized intake workflows.
- Configured and implemented Advanced Grant Management functionality.
- Improved grant, financial, and organizational reporting capabilities.
- Staff trained to use the updated system and workflows.
- Documented procedures and reference materials to support ongoing system use and maintenance.
- Completed project deliverables and supporting documentation necessary for LSC TIP grant reporting.