

# Request for Proposal for Case Management System

Issue Date: March 25, 2020

Due Date: April 30, 2020

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## **Overview**

Oklahoma Indian Legal Services (OILS) seeks a commercial case management software program, including installation, configuration, program modifications, and training services.

**The proposed schedule of events subject to the RFP is outlined below:**

- |   |                      |
|---|----------------------|
| • Public Notice (online)                          | Date: March 25, 2021 |
| • Written requests for clarifications             | Date: April 9, 2021  |
| • Answers to a written request for clarifications | Date: April 16, 2021 |
| • Deadline for Receipt of Proposals               | Date: April 30, 2021 |
| • Notification of Award                           | Date: May 14, 2021   |

1. Each proposal must be accompanied by a transmittal letter briefly summarizing the proposing firm's interest in providing the required professional services. The transmittal letter must also clearly state and justify any exceptions to the requirements of the RFP which the applicant may have taken in presenting the proposal.
2. If the bidder chooses to meet the specifications by adding a third-party component or co-bidder, please identify the component elements of the specification that is being met by this third-party component. Furthermore, the transmittal letter must attest to the fact that no activity related to this proposed contract will cause OILS data to leave the USA or will cause a support or programming person to gain access to the OILS system from outside of the United States.
3. OILS reserves the right to deny any exceptions taken to the RFP requirements.
4. Written requests and Proposals should be submitted to:

**Stephanie Hudson, Executive Director**  
**Oklahoma Indian Legal Services**  
**hudson@oilsonline.org**

**Scope of Services**

Oklahoma Indian Legal Services (OILS) and its attorneys and staff require a legal case management software solution that is hosted centrally and can be accessed from any OILS location via our wide area network, and/or remotely via a secured connection. That system would allow detailed management reporting via OILS defined requirements and user-specific dashboards.

## **What Is OILS?**

Oklahoma Indian Legal Services is a non-profit legal services organization primarily funded by the Legal Services Corporation (LSC). We have been awarded an LSC Native American Grant and we provide free legal services to Tribal members in Oklahoma. Our services are distinct from legal services provided by any other LSC funded organization in Oklahoma. Our attorneys represent clients who have specialized Federal Indian Law and Tribal Law issues.

OILS has ten (10) attorneys and ten (10) staff members. We have a main office in Oklahoma City, Oklahoma, and a branch office in Ada, Oklahoma, which is 100 miles from Oklahoma City. Our Ada office is located on the campus of East Central University, and we have a partnership with the university.

Our attorneys supervise students in their Legal Studies (paralegal) program. We also have partnerships with The University of Oklahoma College of Law and the Oklahoma City University School of Law. Both schools provide credit to law students for internships and externships. We also host students from across the nation each year. We frequently host students from Harvard, Yale, and Dartmouth. The students remain with OILS for a semester. Over the years, OILS has hosted hundreds of law students and university students. OILS needs to be able to hold the student's contact information and remove them from the active user's list at the end of a semester.

## **What We Do**

OILS represents clients in civil work involving Indian land issues. The Indian land in Oklahoma is not fee land owned by the individual clients. The United States Department of Interior either owns the land for the benefit of the individual Indians or places restrictions on the ownership of the Indian land. In every land matter where we provide representation, the US Department of Interior is a party to the case. We must also work closely with the Realty Department of the Tribe where the land is located. Tribal members find it difficult to navigate the complicated relationships involved in the ownership of their Indian land. OILS needs to be able to gather and store information about the individual Indian allotments. Frequently, there are dozens of owners on these allotments. OILS needs to be able to gather information and store information about all the landowners.

OILS represents clients in Juvenile Law issues involving the Indian Child Welfare Act (ICWA). Our attorneys must have expertise in the federal law enacted in 1978. The law provides the Tribe must be an interested party in matters where the children are in State or Tribal custody. These cases often involve multiple attorneys, such as prosecutors, guardian ad items, attorneys for the child, and attorneys for the parents. There are also state social workers, tribal social workers, foster parents, and counselors involved. OILS needs to be able to store information about all the parties and store reports written for each hearing.

OILS represents children as guardian ad litem in Tribal Courts in Oklahoma. Our attorneys interview numerous parties involved in the matter and provide information to the Tribal Court Judge to assist in determining what is best for the Indian child who is not in the custody of their natural parents. OILS needs to be able to store information about all the parties and store reports written for each hearing. OILS needs to be able to easily transmit reports that are stored.

OILS represents grandparents in Tribal Courts who are seeking guardianship or adoption of their grandchildren. Frequently, the children have been in state or tribal custody, so there are multiple parties involved. If the guardianship or adoption takes place in state district court, then the Indian Child Welfare Act (ICWA) applies. Our attorneys must do additional research when ICWA is involved because the ICWA is one of the most litigated areas of federal law.

OILS represents criminal defendants in Tribal Court. LSC usually restricts grantees from criminal representation. However, attorneys with experience in representing defendants in Tribal Court is a complex area of law, so LSC allows Tribal Court representation. This type of representation is more complicated by the 2020 McGirt Supreme Court decision. OILS attorneys are familiar with the facts of the case and the holding by the Supreme Court. Our attorneys must do additional research on the McGirt case because there are cases filed by other attorneys daily in Oklahoma.

Our attorneys are representation in matters which require safeguarding the constitutional rights and the human rights of victims and their families. We have represented high school seniors who have been prohibited from wearing tribal regalia during their graduation ceremony. These matters usually involve multiple governmental agencies and advocacy groups. The attorneys need to be able to have easy access to contact information for all the groups.

OILS' attorneys also provide court facilitation (legal advice and document preparation) in all Tribal Courts. Regularly, OILS attorneys will establish a mobile office at a Tribal Court. Parties will have an opportunity to meet with an OILS attorney. Often, a law student or paralegal student will accompany the attorney to the Tribal Court for the court facilitation meeting.

Several times a month, OILS will host a wills clinic (wills caravan). Several OILS attorneys, staff, and students will travel to a rural Tribal community center. Clients appear at appointment times and meet with an attorney. The attorney will prepare end of life documents for the client. The documents are completed, printed, and executed at the remote location. OILS staff makes copies of the documents and load the copies into our case management system. Clients are counseled on how to safely keep the documents.

## **Technology & Information**

The Executive Director (ED) with the assistance of our Communications Manager (CM), Devin Davis, manager of the OILS' information systems. The ED and CM are Responsible for the acquisition and maintenance of contemporary electronic data processing equipment for the organization, management of OILS' specific applications, such as the OILS' Case Management System. The ED, with the assistance of the CM, is responsible for providing supply, transportation, and equipment support for OILS personnel and serves as the primary purchasing agent for the OILS.

OILS contracts with an outside managed service provider (MSP). The provider maintains our Information Technology. We also employ a Communications Manager, Devin Davis, who acts as the liaison between OILS employees and the MSP. OILS has approximately one (1) Microsoft Physical Servers, which was built by our MSP.

In 2020, OILS purchased Microsoft Surface laptops for each employee. The laptops will be used at the office and home, when necessary. Microsoft Windows 10 has been installed on each laptop. OILS uses Outlook and Exchange for e-mail.

With an ever-increasing workload, OILS is requesting proposals for an extensive and full function Case Management System. The proposal should include:

- Comprehensive Case Management Software
- Related Training
- IT Platform Training
- Server Hardware
- Operating System and Middleware Software
- All related Software Maintenance

The current IT environment is as follows:

- There are approximately 20 total workstations in the OILS' offices. Due to the pandemic, most of our employees are working remotely. However, each employee can bring their laptop to a centralized location, should any software need to be loaded.
  - 20 Surface Pro Laptops
  - Processor – Intel(R) Core TM i5-103567 CPU@1.20 GHz 1.50 GHz
  - Installed RAM – 8.00 GB
  - System Type – 64-bit operating system
  - Windows Edition – Windows 10
  - Version - 1909
  - Should it be required, the organization believes that any Exchange Server should be in the Oklahoma City office to facilitate interaction with the Case Management System. This will allow e-mail and document management functions to operate in a superior bandwidth environment.
- Internet Bandwidth Communication



- AT&T is OILS' internet provider.
- OILS recently upgraded our internet connection in the Oklahoma City office with AT&T dedicated internet 50 Mbps X 50 Mbps.
- The office Each employee has access to an ethernet line with connection to the AT&T dedicated internet.
- OILS recently replaced the equipment with an Axis T8120 Midspan 15 W 1-port HPE Aruba 2930F 48G 4SFP Switch-48 Net.

OILS has a branch location in Ada, Oklahoma, which is 100 miles southeast of Oklahoma City. Our office is located on the lower level of the Horace Mann building on the East Central State University campus. We have three (3) employees who share a room that has been converted into an office. Any software placed onto OILS' equipment must connect to University internet services through the University firewall.

## **Requirements for the OILS Case Management System**

- A Centralized Case Profile Repository
- The Case Profiles will provide summary information on all cases being handled by OILS.
  - The profile will provide all contacts on the case
  - critical dates related to the case (docket information)
  - the attorneys assigned to the case
  - opposing parties
  - case notes
  - document variables for standardized documents and more.
- These profiles and related document templates must be available in different formats for each Case Type of the organization.
  - The Case Profile provides a single location for the user to go to and find all of the pertinent updated information regarding a case.
  - The Case Profile links and is integrated with all major systems of Case Management
    - Client Relationship Management (CRM);
    - Document Templates;
    - Document and e-mail Management Systems;
    - Records Management/Dead Files;
    - Conflict Avoidance Systems;
    - Docketing/Calendar Management Systems and Litigation Support Systems.
- The proposed Case Management System should provide Internal/External capabilities to facilitate the sharing and collaboration of case information between other agencies.
- The Case Profile Page must be integrated with the CRM, Docket, and Document Management Systems. For example, when a user fills out a date in the Case Profile, the system should automatically create or update the record in the Docket System as well as notify the professionals on the case via e-mail.
- The integration with CRM, Document, and e-mail management should also be similar in concept related to the docket system's integration with the Case Profile.
- The Document Template Portion of the Case Profile Page provides user-definable fields that work in conjunction with field exchange to a standardized document, i.e., a pleading, a request for medical records, etc.
  - Document Template Variables are entered into the Case Profile Page.
  - Document Templates need to be available for each practice group since their document requirements and their templates will be different with each practice group.
  - The System will need to accommodate hundreds if not thousands of Document Templates. Document Templates will facilitate the automatic generation of repetitive documents that are needed for a case.
- The Contacts section of the Case Profile Page should work in conjunction with the CRM (Client Relationship Management) system so the data only has to be entered once.

- The contacts found in the CRM System can be connected to one or many Cases.
- Case Notes can be completed and shared via a Case Profile.
  - Case Notes should be accessible from anywhere and by all of those professionals working on the case.
  - Case Notes should identify who made the note and when it was made.
  - Access to a case profile would need to be secured via authentication.
  - Access could be granted based on a user's security to the client-matter-case identifier.
  - The user can Add, Edit, View, and Print Case Notes and Case Profile Page information.

## **MAJOR APPLICATION MODULES THAT MUST BE INTEGRATED**

### **A. Case Intake System**

1. Case Intake System must be able to collect the following (and additional as determined during implementation) personal information about an applicant:
  - a. Name
  - b. Address
  - c. Phone number
  - d. Date of birth
  - e. Gender identifier
  - f. Tribes
  - g. Tribal membership
  - h. Blood quantum
  - i. Veteran status
  - j. Marital status
  - k. Citizenship status
  - l. Mother
  - m. Mother's Tribe
  - n. Father
  - o. Father's Tribe
  - p. Individual tracts of Indian land owned
  - q. Child/Children
  - r. Adverse parties
2. Case Intake System must be able to collect the following financial information:
  - a. Employment income
  - b. Social Security income
  - c. Individual Indian Monies Account
  - d. Other types of income (Need to add)
3. Case Intake System must be able to collect the following information about the request for legal assistance
  - a. Intake Questions about Indian land
  - b. Intake Questions about ICWA/Juvenile
  - c. Intake Questions about Guardianship
  - d. Intake Questions about Adoption
  - e. Intake Questions about Family Law issues
  - f. Intake Questions about Disaster Assistance
  - g. Intake Questions about Individual Rights
  - h. Intake Questions about other legal issues

### **B. Case Relationship Management System - users can integrate Outlook Contacts.**

1. Contacts for the CRM system should be able to be generated from a user's Outlook contacts.

2. The Contact in the CRM System can be linked to one or many Cases.
3. The Contact in CRM should be able to be retrieved for use with Microsoft Word when producing documents, thus eliminating retyping and retrieval time.
4. The contacts need to integrate with Microsoft Word for correspondence, Outlook-based e-mail, or for the generation of Mailing Labels.
5. The CRM system should provide a Notes section that documents the date/time and the user who added the Notes about the Contact.
6. CRM should provide a place to store all types of contacts, i.e., opposing party names, opposing counsel names, attorney and paralegal names, judges names, witnesses, expert witnesses, etc.

**C. Docket/Calendar Management Specifications**

1. The system must have a formal Client/Matter Intake process to set up and provide a case/matter intake number/identifier.
2. The ability to break down dates/events or dates/event-sets by Case Type.
3. The ability to create event-set calculations based on Case Type.
4. The ability to integrate with Microsoft Outlook e-mail and calendars to integrate with both personal e-mails and personal calendars.
5. The ability to produce e-mail reminders before the hearing/deadline dates and to do so on a flexible scheduled basis for those reminders.
6. The ability to produce an e-mail look-ahead report (by week, two weeks, month, etc.)
7. The ability to take an existing Outlook calendar event and add it to the Docket System.
8. The ability to add a reminder to other user Outlook calendars.
9. The ability to see Docket entries and reminders on employee's mobile devices.
10. Pre-prepared Reports by Date, by Client/Matter, by Attorney, and others without having to formulate a report or query.
11. The ability to change statuses on one or many events.

12. The ability to batch change values.
13. Must integrate with the Case Profile Page.
14. When creating an entry, the system should know who the employee is because it gets that information from the Client/Matter portion of the system.

**D. Document and e-mail Management Specifications**

1. A Document Management System must be an integrated part of the Case Management System.
2. The Document Management System must have a Template System that works in conjunction with the Case Profile Page's template section.
3. The Document Management System must be able to field-exchange data from the Case Profile Page into the standardized document templates.
4. The Document Management System must be able to house many documents.
5. The Document Management System must have the capability to work with any file format, i.e. Word Documents, Excel Spreadsheets, PDFs, Photographs, Voice/Wave files, etc.
6. The Document Management System must have a disaster recovery capability at either the case management system level or just the document level.
7. The Document Management System must have the ability to provide Portal capabilities for purposes of sharing documents on a secured basis with outside experts or outside counsel.
8. The Document Management System must have the ability to Copy/Move document(s) from one Library/Cabinet to another or within the same cabinet/library. These separate libraries are important, considering this organization has separate divisions.
9. The Case Management System must have the ability to provide records management (dead file system) along with the ability to provide archival retention capabilities. This records management capability must also provide bar-coding functionality.

10. The Document Management System must have the ability to batch-edit multiple document profiles to either replace, modify, or add additional values to multiple document profiles.
11. The system should also be able to edit individual case profile pages.
12. The Document Management System must have the ability to open a document from the Case Profile Page.
13. The Document Management System must have the ability to convert an existing document into PDF and place it on the same Document Profile Page for ease of use with an Electronic Court Filing System.
14. The Document Management System must have the ability to create unlimited versions.
15. The Document Management System must have a Metadata removal process in conjunction with e-mailing red-lined and clean copies to others.
16. The Document Management System must have the ability to link documents via the email system to eliminate multiple copies of the same document. This approach also eliminates overloading an e-mail system.
17. The Document Management System must have the ability to work with Word's built-in Compare feature or another third-party product to produce red-lined results between two documents or two versions.
18. Compared results must be able to be placed on the same profile as the clean copy.
19. The Document Management System must be able to save e-mails from Outlook and/or the Attachment(s) only into the Document Management System.
20. The Document Management System must be able to Import selected file(s) or to be able to mass import documents into a Case.
21. The Document Management System must be able to link documents to the Docket System or to the CRM System or to the Case Profile.
22. The Document Management System must have a full-text search engine and a query-by-example form to facilitate exacting document searches.
23. The Document Management System must be able to search by all fields and be able to create reports based on search results.

**E. Litigation Support Specifications:**

1. The Litigation Support System must have the ability to produce reports based on Persons, Issues, Critical Documents, ETC.
2. The Litigation Support System must have the ability to add on-demand keywords for Persons, Issues and other definition tables, etc.
3. The Litigation Support System should be able to Import Document Profiles from other Document Management Libraries.
4. The Litigation Support System must be able to run locally on a laptop PC for portability.

**F. Conflict of Interest System.**

1. The Conflict-of-Interest Form must have the following fields to provide the information necessary to perform a prior search:
  - a. Search name – entered the way you would see the information in a phone book.
  - b. Type of party – Adverse, Adverse-related party, Client, Client-related party, CoDefendant, etc.
  - c. Client-Matter
  - d. Responsible attorneys, paralegals, team members
  - e. Date opened
  - f. Date closed
2. The Conflicts Report or Screen Shot must contain the Client-Matter, Relationship, and Search Name.
3. The Conflict Search must produce an electronic report via e-mail with links to the complete Conflict database record for review and approval or decline. The user must be able to add comments regarding the approval or decline.
4. On a daily basis or on-demand, the system must send an electronic report to all users identifying what client matters were approved and declined.

**G. Records Management Specifications**

1. The Records Management System must be part of the Case Management System.
2. The Records Management System will keep track of every expandable file folder and document inserted therein via bar-coding, which will provide the current location and telephone extension of the file's location, previous locations, and comments about the contents of the file.
3. The Records Management System must be able to print labels with bar-coding.



4. The Records Management System must provide the current location and at least the last 10 prior locations of the physical file.
5. It also must provide a telephone extension of the location for the physical file.
6. The bar-code reader must be able to update the records in the Records Management System on-demand or a daily routine schedule.
7. The Records Management System must provide a simple search engine by bar-code number to locate the physical file.

## **H. Electronic Form Specifications**

1. Electronic forms must be part of the Case Management System primarily to generate timesheets for payroll.
2. The Electronic Forms system must have the ability to provide several layers of approval.
  - a. Approvers – (Person(s) who may approve or reject submittals based on this form), Optional (Person(s) who may approve or reject submittals based on this form –the second level of approval).
  - b. Copy recipients – (Persons who are copied when the originator submits the form; Approvers are automatically notified, so do not include them in this list).
  - c. Action notices – (Originator and Approvers and Completers are automatically notified of approval action; do not include them in Action Notice list; use this only for other persons to be notified).
  - d. Completers – (Completers are authorized to mark the form as completed [fulfilled]. They are automatically notified when a form is approved (or approved with conditions). Not all forms need a "completer"; use a completer only if something has to be done after approval, such as issuing a check, purchasing an item, filing a document, etc.)
  - e. Approvals or Declines can be submitted with or without comments.
3. The Electronic Forms system will have an easy-to-use form development tool so OILS can generate new forms as needs arise.
4. The Electronic Forms system must be integrated with the Outlook/Exchange e-mail system.
5. The Electronic Forms system must be able to update other parts of the system upon the approval process to eliminate rekeying of data.

6. The Electronic Forms system will provide several standard reports by User and Statuses of the Form submitted.
7. The Electronic Forms system will provide a standard History Report of Forms that have been Approved or Declined.

**Disaster Recovery Capability:**

The software or the platform must have the capability to fail the entire system over to a second location.

**Summary**

Oklahoma Indian Legal Services is requesting your bid on a Case Management System that provides the following integrated functional elements:

- a. Case Intake System
- b. Case Management Centralized Repository (A Case Profile)
- c. An integrated CRM (Client Relationship Management) System
- d. An integrated Docketing/Calendar Management System
- e. An integrated Document Template System (a system for generating standard legal documents from information located in a Case Profile)
- f. An integrated Document and e-mail Management System
- g. An integrated Litigation Support/e-discovery System
- h. An integrated Intranet/Extranet Capability
- i. An integrated Records Management System (Dead File Management with bar-coding)
- j. An integrated Conflict Avoidance System
- k. An integrated Electronic Forms Routing System (a Workflow System)

## **IT/Network Environment**

### **Work Station Specifications:**

Laptop work stations include Windows 10 Operating systems

Laptop work stations currently use the most current version of MS Office

Laptop work stations have approximately the same-sized hard disk drives and are commensurate with industry standards.

All PC work stations and devices are connected via MS Teams.

All IP addresses are static.

### **Server Specifications**

The Case Management System should run on as few servers as possible for ease of management and can be virtualized locally.

### **Graphical Interface**

The desktop interface should be a Web browser and preferably should be Web browser independent and run from the internal/local application. Multiple browsers should be supported in this order of priority: Google Chrome; Microsoft IE; Mozilla Firefox.

## **Formatting Your Proposal**

Please format your proposal as follows:

### **A. General Proposal Section**

1. General Information regarding your company.
2. How long has the company been in business?
3. Is the company publicly traded or privately held?
4. What are your annual revenues?
5. Please provide an audited financial statement.
6. Identify the number of total employees in your company.
7. Identify the number of employees your company would provide to this project as well as the number who will support the software.

### **B. Experience, Reputation, and Expertise**

1. Please provide three or more references with contact information.
2. Describe all projects you have performed for legal services organizations.
3. Within that description, identify the size of the office for which the work was performed.
4. Provide names and resumes of the staff who would work on this project.

### **C. Pricing and Schedule Proposal Section**

1. Outline of Pricing of All Elements of Your Proposal Section
2. Outline your schedule for completion of the project Section
3. Alternative Pricing and/or Schedule
4. Outline of Pricing of Modules that may need to be added after completion.

## **GENERAL REQUIREMENTS**

1. Vendor should have experience in completing case management implementations. The software must be flexible enough to be implemented for a non-profit legal services provider.
2. Vendor must have sufficient support staff for an effective/successful implementation.
  - Please submit resumes outlining the experience of all who would be assigned to the implementation team for OILS.
  - Resumes of remote support staff should also be included.
  - Please outline which support staff would be on-site and for how long.
  - Please outline how support is handled remotely and under what circumstances support should be handled remotely.
  - Please outline the role of each remote support person i.e. help desk, program fixes, business intelligence, report writing, remote training, etc.
  - Please outline your preferred remote access tools for supporting/presenting to the OILS staff, i.e. Zoom or other.
  - Please outline your secure-use procedures for the use of these tools.
3. The software program and professional service vendor, upon contract signature, must be able to commit to immediate planning and implementation (within 60 days) of the project and show substantial progress toward completion (40% or better) of the implementation within the 90-180 day time period.
4. OILS requires a software vendor that has numerous quality references showing successful implementations with legal services programs.
5. Migration: Ability to migrate current/existing SQL/Access databases/data to the case management system.
6. The software program must be able to provide agency-definable, user-designed reporting functions. Reporting functionality must be specific for each type of user, categorized by jurisdiction, case type, and 39 Oklahoma Tribes. Web browser access must be available and provide maximum flexibility to allow for drill-down reporting, visual charting, and statistical counts.
7. OILS requires a software vendor that can provide full and extensive services to quickly implement the case management software project. Limited resources (OILS technical staff) require that most of the services be performed by the software vendor. The following services need to be provided by the software solution provider, but not limited to:
  - Project management to lead the project – a Senior Project Manager shall be assigned and available for the duration of the project.
  - Complete administrator training and end-user training for every system user statewide; an implementation and training specialist should be assigned and available for the duration

of the project. OILS will provide an in-house trainer who will be trained by the software vendor who can help on an on-going basis related to future training of staff.

- Development services must be built into the contract for document template creation, system reporting, and screen modifications, due to OILS specialized services that differ from other Basic Field programs.
- Custom development services for data integration and conversion.
- System go-live training and the availability of annual onsite update and refresher training.

8. OILS requires a software solution provider that utilizes Advanced Programming Techniques. OILS requires a vendor that can quickly add software enhancements and features into their program to allow for rapid enhancements that may be required for OILS program operation.

9. OILS requires a software solution that includes the ability to link directly to documents, video and audio records, and other electronic files which are generally located on the local server but may also be located on the servers of external agencies.

10. OILS requires a software solution provider that utilizes industry-standard, accessible database frameworks such as those using ANSI Standard SQL databases which are compatible with others.

11. For funding and budget reasons, OILS prefers a software solution provider that provides consistent, quarterly, or annual software releases with enhancements, without any additional purchase cost other than an annual software maintenance fee.

12. A software solution is required that would allow a minimal desktop installation footprint. DOJ technical and installation resources are limited, and a solution is required that reduces on-site end-user desktop installation and maintenance.

**General Evaluation Criteria**

1. Experience, Reputation, and Expertise in legal services case management systems.
2. Technical viability of proposed solution based on criteria.
3. Price.
4. Schedule for completion.