



SOUTHERN ARIZONA  
**LEGAL AID, INC.**

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**REQUEST FOR PROPOSALS (RFP)**

**FOR**

**LEGAL SERVICES PROGRAM TECHNOLOGY ASSESSMENT**

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**ISSUE DATE:** December 5, 2022

**ISSUED BY:** Southern Arizona Legal Aid, Inc.  
2343 E. Broadway Blvd., Suite 200  
Tucson, AZ 85719

**INQUIRIES:** Point of Contact (POC)  
Jamie Ibrahim, Deputy Director  
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**INFORMATION DUE:** February 1, 2023 at 5p.m. AST

**INTRODUCTION:**

Southern Arizona Legal Aid, Inc. (SALA) provides free civil legal services to low-income residents of southern Arizona. Our assistance preserves safe and affordable shelter, stabilizes family relationships, protects victims of domestic violence, secures access to healthcare and public benefits, and reduces barriers to employment for our clients.

**OVERVIEW AND OBJECTIVE:**

SALA is soliciting proposals for a consulting firm that has experience working with legal services programs and/or nonprofits to assess our current technology administration, policies and procedures including staff utilization and needs, along with providing recommendations to be used to construct a priority-based technology implementation plan.

The contractor will coordinate with SALA staff, and vendors where appropriate, to assess current technology administration and technology utilization by staff. To obtain feedback, the contractor will develop tools to survey and obtain input from staff and relevant stakeholders on their technology interactions, experiences and recommendations.

The assessment should evaluate: 1) how the organization oversees technology administration, 2) the extent to which technologies are outdated, redundant or otherwise inefficient or ineffective, 3) identify effective technology trainings and protocols, and 4) establish targets for continued improvement in technology administration and processes.

**SCOPE OF SERVICES:**

The RFP respondent that is awarded a contract on the merits of its offer shall be responsible to:

- Conduct periodic meetings to discuss progress and unique issues that have surfaced
- Provide a weekly status report noting progress against each measure to the management team.
- Notify the management team separately and immediately of any urgent issues identified and an estimation of the risk.
- Provide an assessment report of SALA's information technology system environment including:
  - IT Structure within the Organization
  - Third party service providers and a high level evaluation of each
  - Review of information technology processes and procedures, policies, protocols and guidelines
  - Review of outsourced technological services and analysis of cost effectiveness
  - Review of remote data access and management of mobile devices
  - Identification of high-risk IT issues needing immediate attention
  - Maintenance needs
  - Analysis of cloud hosting / storage / backup.
  - Security and privacy needs
  - Technology-related training needs of technology staff and end users

- Telecommunication system(s) lifecycle and practices
- Security controls - network, system and application
- Backup/Restore routines
- Antivirus systems and practices
- Problem escalation, resolution, help desk
- Desktop Hardware Asset Details and Lifecycle
- Printer Hardware Asset Details and Lifecycle
- Server Hardware Asset Details and Lifecycle
- Microsoft licensing audit (OS, CALS, Productivity, Server, SQL)
- Server OS use and management
- Desktop OS use and patch management
- Database use and patch management
- Purchasing practices and governance
- Hardware Maintenance practices
- Recommendations for immediate, practical and cost effective improvement

**PROJECT DELIVERABLES:**

All recommendations identified during this engagement will be documented and reviewed with SALA management. All deliverables produced during the engagement are for the sole use of SALA. All work papers, analyses and final reports will be and remain the property of SALA and may not be distributed or released to others without the prior written consent of SALA.

Project Deliverables under this contract will include the following:

- Detailed project plan including project activities, dates, deliverables, meetings
- Agreement to meet periodically with SALA staff, including meetings with the project's team members, to discuss progress and unique issues that may arise (meetings may be online / by phone)
- An easy-to-comprehend Technology Assessment Report prioritizing practical recommendations and solutions to address gaps in technologies or services.
- Propose solutions to identified issues and problems
- A list of technical concerns and recommendations.
- Feedback and suggestions for improving or needed technology-related policies.
- Staff survey results that can be used to make additional decisions regarding technology planning, training, and development.
- Technical details for key technical personnel.
- Estimated, based on experience, of the costs to implement solutions, including technology that is offered for free or at reduced prices to non-profits.
- A presentation to the project's team once the Technology Assessment Report is completed.

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**PROPOSAL SUBMISSION REQUIREMENTS:**

Please submit the following with the proposal in a single PDF file as an email attachment and emailed to [jibrahim@sazlegalaid.org](mailto:jibrahim@sazlegalaid.org).

1. Letterhead with company name, address and contact information
2. Name, title, address and contact information, along with preferred form of contact, of the person to contact who is authorized to represent the company, agency or contractor and to whom correspondence should be directed
3. Federal taxpayer ID for the company, agency or contractor
4. General information including number of years in business, length of time providing the proposed services, total number of clients, number of personnel and location of personnel that would work on this project
5. A brief statement of your understanding of the services to be performed
6. Describe your approach and methodology for providing these services.
7. Describe how your organization is positioned to provide services listed above and a history of the experience providing similar services. Explain any history you have working with legal services organizations, including knowledge of resources available to nonprofits.
8. Acceptance of SALA's proposed project timeline
9. Total proposed project cost itemized as appropriate
10. Identify the names of principal staff and key personnel who will provide the services. Please submit resumes or qualifications for each key staff person, summarizing their experience and expertise. Describe each person's role and responsibility with the project. Any substitutions of staff after the award of the contract will require the approval of LSP.
11. Signature of an officer or other person who is legally authorized to bind the applicant to the proposal cost and schedule
12. Provide the name, title, address and contact information of three references for clients who you have provided the same or similar services. Provide information on the actual services provided and length of time services were provided to client. Nonprofit references, specifically related to organizations providing legal services, are preferred.

**EVALUATION CRITERIA:**

Proposals will be evaluated based on the contractor's responsiveness to the RFP, qualifications, examples of prior work, references and the total price quoted for all items covered by the RFP.

The following will be reviewed, scored and a decision made based on the responses:

- Overall proposal quality, which includes compliance with all RFP requirements, well-organized, and easy-to-follow format

- Skill and experience of the organization, including key personnel
- Demonstrated experience with similar projects, particularly work with nonprofit legal services organizations and/or nonprofits in general
- Familiarity with Legal Services Corporation's Technology Baselines
- Organization's willingness and agreement to allow LSP staff to assist in gathering data for the assessment and in performing other tasks to assist with the assessment to help reduce the cost of the assessment
- Clear description of services to be provided
- Timeline of project, including payment schedule, information gathering and final report production and meeting
- Budget/cost
- Results of communications with references supplied by potential contractor
- Ability / commitment to meet time deadlines and reporting requirements

The successful contractor may be asked to participate in negotiations and may be asked to revise their proposal based on the negotiations. In submitting a proposal, each contractor acknowledges that they have read and understand these requirements.

### **AWARD OF CONTRACT:**

Award of the contract resulting from this RFP will be based upon the most responsive contractor whose offer will be the most advantageous to SALA in terms of cost, functionality, experience, assessment of the quality of past work, and other factors as specified elsewhere in this RFP.

SALA reserves the right to:

- Consider proposals based on their relative merit, risk, and values to the organization;
- Negotiate with all respondents to the RFP;
- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential contractor, when it is in SALA's best interest; and
- Accept other than the lowest priced offer.

Competitive proposals will be considered and will result in a Fixed Price Contract. Selection will be made on or before March 1, 2023.

### **REJECTION OF PROPOSALS:**

SALA reserves the right to accept or reject any and all proposals and to waive any minor discrepancies or technicalities in the proposal or specifications, which are required to complete this project, or when deemed to be in the best interest of SALA.

**PROPOSAL DELIVERY AND DUE DATE:**

Proposals are due to SALA on or before 5:00 p.m. AST on Wednesday February 1, 2023. Proposals shall be emailed in a single PDF file to [jibrahim@sazlegalaid.org](mailto:jibrahim@sazlegalaid.org) with “Technology Assessment Proposal” in the subject line. You will be sent a confirmation of email receipt. If you do not receive a receipt within two business days, please contact the Point of Contact to inquire. Proposals submitted in any manner other than as detailed in this paragraph, or are submitted after the deadline, shall be deemed to be invalid and may be excluded from consideration.

**PROJECT SCHEDULE:**

- RFP issued to vendors: December 5, 2022
- Proposals due at Southern Arizona Legal Aid, Inc.: February 1, 2023 at 5:00 pm AST
- Interviews with finalists: February 2023
- Award of Contract: March 1, 2023
- Project Implementation: March 15, 2023 – August 30, 2023
- Development of final report for grant funder: September 1, 2023 – September 30, 2023