



**REQUEST FOR
PROPOSALS (RFP):**

**TECHNOLOGY INFRASTRUCTURE
ASSESSMENT & SECURITY AUDIT**



Coast to Coast Legal Aid of South Florida, Inc. (CCLA) is soliciting proposals from qualified firms or professionals (“Consultants” or “Vendors”) for:

IT TECHNOLOGY INFRASTRUCTURE ASSESSMENT AND SECURITY AUDIT

ORGANIZATIONAL OVERVIEW

Established in 2003, CCLA is a Legal Services Corporation (LSC)-funded, non-profit 501(c)3 organization. CCLA provides free civil legal services to low-income and otherwise eligible residents of Broward County and is located in Plantation, Florida, a suburb of Fort Lauderdale. CCLA’s 2024 budget is approximately \$5 million with a staff of just under 50 FTEs. Our mission is to provide equal access to justice to underserved communities through quality and innovative free civil legal aid. CCLA provides legal advocacy for marginalized individuals in our community, helping thousands of economically disadvantaged residents to gain greater access to justice and much-needed legal assistance to remove barriers to a healthy and stable life. We believe all individuals are entitled to quality civil legal representation and equal access to justice, regardless of their income. CCLA’s vision is a community where everyone has the legal resources to thrive.

CCLA provides free civil legal assistance in three primary unit areas of law:

(1) The Family Law and Victims of Crime Unit provides legal advice, counsel, and holistic representation to pro se litigants, eligible clients, and victims of intimate partner violence, human trafficking, and victims of crime who are seniors including: Injunctions for Protection, Dissolutions of Marriage, Paternity Defenses, assertion and enforcement of victims’ rights in criminal cases, expungements for victims of human trafficking, housing, and benefits;

(2) The Senior Citizen Law Project provides legal advice, assistance, and representation to seniors age 60+ and caregivers in the following areas: landlord-tenant including, public/subsidized housing, eviction defense, health and public benefits, Medicaid, Medicare, naturalization to assist clients to qualify for SSI and Medicaid benefits, managed care and long term care, foreclosure defense, debt collection defense, defending garnishment of social security and wages, abuse, exploitation and representation of victims to obtain protective orders against abusers by family members; and

(3) The EACH Unit (Economic Advocacy and Community Health) provides free legal advice, assistance, and representation to low-income individuals and their families in the areas of healthcare access, Medicaid, Social Security Disability and SSI, SNAP (food stamps), TANF (Temporary Assistance for Needy Families), and reemployment benefi

RFP OVERVIEW

Coast to Coast Legal Aid of South Florida, Inc. (CCLA) has been awarded a Technology Improvement Project (TIP) grant through the Legal Services Corporation (LSC), to improve its independent internal technology infrastructure. CCLA seeks to conduct a technology assessment, security audit and to develop a technology implementation plan to ensure effective and efficient delivery of high-quality legal assistance to the program's client community.

Instructions for Respondents

SCHEDULE

Solicitation Date Announcement	October 18, 2024
Zoom Meeting with members of CCLA Management Team (not mandatory and only with appointment)	This is by appointment only. Contact Katianna Mazard, Director of Operations & Management at kmazard@legalaid.org , include "Zoom Meeting for RFP" in the subject line of your email.
Deadline to Submit Questions	By 5 PM on November 18, 2024
RFP Responses Due	By 5 PM on November 25, 2024
Notice of Award	By 5PM on December 6, 2024
Contract Executed	By 5 PM on December 16, 2024
Contract Effective Date	By 5PM on January 2, 2025
IT Technology Infrastructure Assessment and Security Audit Conducted	January through February 28, 2025
Draft Assessment Report Issued	March 28, 2025
Final Assessment Report Due	May 30, 2025
Final Presentation to the Board	September 2025

CCLA is on a strict timeline and therefore will not entertain late proposals.

1. SUBMITTING PROPOSALS

Proposals must be saved in PDF format and emailed to kmazard@legalaaid.org.

NOTE: The subject of the email *MUST* include “IT Technology Infrastructure Assessment.”

The term of the engagement shall be until completion of the IT Technology Infrastructure Assessment and Security Audit, and all timely requirements of this RFP. The award shall be made to the Consultant/Vendor whose proposal is determined by CCLA to be the most advantageous to the organization. Evaluations shall be based on the factors set forth in the RFP. The review committee may contact the firms/professionals regarding their proposals for clarification and record in writing the nature of the clarification. If CCLA selects a proposal, CCLA will provide a written notice of the award. CCLA anticipates awarding one contract but reserves the right to award more than one contract if in its best interest. If it is determined that no acceptable proposal has been submitted, all proposals may be rejected. New proposals may be solicited on the same or revised terms, or the procurement may be abandoned.

CCLA reserves the right to reject proposals with or without cause and for any reason, to waive any non-material irregularities and technicalities, and may solicit and re-advertise for other proposals. Incomplete or non-responsive proposals may be rejected by CCLA as non-responsive or irregular. CCLA reserves the right to reject any proposal for any reason, including, but without limitation, if the Consultant fails to submit any required documentation or meet deadlines, if the Consultant is in arrears or in default upon any debt or contract to, or has failed to perform faithfully any previous contract with any not-for-profit or governmental jurisdiction. All information required by this RFP must be supplied to constitute a proposal.

The Consultant understands that neither this RFP nor the notice of award constitutes an agreement or a contract with the Consultant. A contract or agreement is not binding until a written contract or agreement has been executed by both CCLA and the successful Consultant.

2. PURPOSE

CCLA is in the process of obtaining a new office location that can accommodate our entire staff, is within a reasonable distance from the Broward County Courthouse, and is located near public transportation for applicants and clients. Part of Relocation includes planning for the move and setting up infrastructure to name a few. CCLA plans on enhancing our technology infrastructure as we prepare for our upcoming move to a new building. While we do not yet have an exact move-in date, as our new space needs to be built-out, our lease with our current Landlord is expected to expire on September 30, 2025.

As previously stated, CCLA is located in Broward County, which is the second largest county in Florida. Since the Covid-19 pandemic, the state of Florida and Broward County have experienced a significant increase in new residents. CCLA has served the community since

2003 and has grown over the years. It is CCLA's desire to develop and implement an IT Technology Infrastructure that will expand and enhance the services of the organization to meet the growing legal needs of the Broward and Collier County residents.

The proposed project addresses several critical challenges faced by CCLA as it transitions to an independent location from a shared building with Legal Aid Service of Broward County (LASBC). Over the past 21 years of operation, CCLA has relied on LASBC for its technology infrastructure without managing its own. This lack of autonomy has hindered CCLA's ability to tailor its technology to its specific needs and requirements. In an era where data breaches and cyber threats loom large, safeguarding sensitive information isn't just prudent—it's paramount. For a law office entrusted with clients' most confidential matters, the stakes are even higher. A comprehensive security audit isn't just a proactive measure; it's a cornerstone of ethical practice and client trust. A thorough security audit acts as a shield, fortifying digital infrastructure against potential breaches and ensuring compliance with industry regulations. The assessment will evaluate CCLA's cybersecurity training (in addition to the current KnowBe4 training) and measures necessary to ensure security.

3. SCOPE OF WORK

The assessment aims to identify any gaps or deficiencies in the existing infrastructure, as well as to determine the most efficient and cost-effective solutions for the organization's needs, with an eye towards the future. Moreover, the assessment will provide recommendations regarding the necessity of hiring or retaining internal IT staff or independent vendors to manage and support the technology infrastructure effectively. This includes evaluating essential components such as phone systems, internet connectivity, storage solutions, software, hardware, case management system, domain, email, website hosting, network administration, cybersecurity, and technical support.

Furthermore, CCLA has limited experience with retaining vendors and IT hiring, so the assessment will need to identify quality service vendors capable of providing ongoing support and maintenance for the technology infrastructure. This includes evaluating vendors for services such as phone/Voice over Internet Protocol (VoIP), server maintenance, and cybersecurity. By addressing these challenges, the project aims to empower CCLA with the necessary technology infrastructure, information, and support services to enhance its operations and serve its clients effectively. By leveraging technology effectively, CCLA can streamline its operations, improve communication with clients, enhance data security and accessibility, and ultimately, provide more efficient and effective quality legal services to low-income individuals in the region, thus fulfilling its mission to promote equal access to justice for all members of the community.

Deliverables:

- a. An updated technology and implementation plan
 - Comprehensive plan outlining the scope, objectives, timelines, and resources for the technology infrastructure assessment project.
- b. Documentation of Review of Current Workflows and Technology:
 - Detailed documentation of the review conducted on existing workflows and technology infrastructure, highlighting strengths, weaknesses, and areas for

improvement.

- A remediation plan for any vulnerabilities found in the security audit.
- c. Weekly Meetings for Status/Progress Updates:
- Regularly scheduled meetings, either over Zoom or in-person, to discuss the status and progress of technology infrastructure design and implementation.
- d. Final Report:
- Comprehensive report summarizing the findings of the assessment, including what works well, pain points, concerns, and areas for improvement.
 - Recommendations should include multiple solutions and/or products when necessary, including cost estimates when available.
 - Recommendations for enhancing the technology infrastructure and support services to better serve CCLA's operations and clients effectively.

4. **TECHNICAL REQUIREMENTS**

Consultants must have at least five years of experience in IT Technology Infrastructure Assessment and Security Audit. Experience leading IT Technology Infrastructure Assessment for legal aid organization(s) and knowledge of legal service organizations is preferred.

5. **PROPOSAL COSTS**

Neither CCLA nor its representatives shall be liable for any expenses incurred in connection with preparing a response to this RFP. Consultants should prepare their proposals simply and economically, providing a straightforward and concise description of the Consultant's ability to meet the requirements of the RFP.

Pricing must be itemized and include a written explanation of all fees and costs, including travel costs if any. CCLA is a 501(c)(3) tax-exempt organization.

6. All deliverables and work product produced will be owned by CCLA, its successors and assigns. Materials submitted in response to this RFP will not be returned.
7. CCLA reserves the right to change this RFP schedule or issue amendments to this RFP at any time. CCLA reserves the right to cancel or reissue the RFP.
8. The selection of a Consultant pursuant to this RFP does not constitute an endorsement of the Consultant's services.

9. **INQUIRIES**

Consultants may email inquiries for interpretation of this RFP or other questions to

kmazard@legalaid.org until **5 PM on November 18, 2024**. CCLA will not respond to inquiries received after **5 PM on November 18, 2024**. Please include “**Question Regarding IT Technology Infrastructure Assessment RFP**” in the subject line.

CCLA will record its responses to inquiries and any supplemental instructions in the form of a written addendum. If addenda are issued, a link will be posted to the coasttocoastlegalaid.org website **by 5:00 PM November 18, 2024**. It is the sole responsibility of Consultants to remain informed as to any changes to the RFP.

10. DELAYS

No delays are anticipated because of the short timeframe for compliance.

11. PRE-PROPOSAL MEETING No pre-proposal meeting is scheduled.

12. PROPOSAL FORMAT

In order to ensure a uniform review process and to obtain the maximum degree of comparability, it is required that the proposals be organized in the manner specified herein.

RFP Proposals/Responses must be delivered via email to kmazard@legalaid.org. All information submitted by the Consultants shall be in PDF format with a PDF electronic signature or a wet ink signature provided via scanning.

All proposals shall be submitted as specified in this RFP. To be considered, the proposal must respond to all parts of the RFP. Any other information thought to be relevant, but not applicable to the enumerated categories, should be provided as an appendix to the proposal. You may use this section to add relevant information but additional points will not be awarded for extraneous information in the appendix that are not responsive to the RFP.

Consultants shall prepare their proposals using the following format:

A. Letter of Transmittal

This letter will summarize in a brief and concise manner, the Consultant's understanding of the scope of work and make a positive commitment to provide its services on behalf of CCLA. The letter must name all of the persons authorized to make representations for or on behalf of the Consultant, and must include their titles, email addresses, and telephone numbers. An official authorized to negotiate and execute a contract on behalf of the Consultant must sign the letter of transmittal.

B. Title Page

The title page shall show the name of Consultant and/or Consultant's agency/firm, address, telephone number, name of contact person, date, and the Project name (i.e., “**IT Technology Infrastructure Assessment RFP Proposal**”).

C. Table of Contents

Include a clear identification of the material by section and by page number.

D. Organization Profile and Qualifications

This section of the proposal must describe the Consultant, including the size, range of activities, and experience providing similar services, including:

- Documentation indicating that it is authorized to do business in the State of Florida and, if a corporation, is incorporated under the laws of one of the States of the United States.
- A description of the primary individuals responsible for supervising the work including the percentage of time each primary individual is expected to contribute to this work.
- Resumes and professional qualifications of all primary individuals and identify the person(s) who will be CCLA's primary contact(s) and provide the person(s)' background, training, experience, qualifications and authority. The person(s)' experience in working with non-profit organizations and/or legal services organizations for IT Technology Infrastructure Assessment.
- Your opinion on five critical factors that contribute to successful technology infrastructure assessment.
- Your unique capabilities/experiences that you bring to the process.

E. **Experience / References**

The Consultant must describe its expertise in and experience with providing IT Technology Infrastructure Assessment services similar to those required by this RFP. The Consultant must provide three references and three examples of completed IT Technology Infrastructure Assessment.

F. **Approach to Providing Services**

This section of the proposal should explain the Scope of Work as understood by the Consultant and detail the approach, activities, and work products to be provided.

G. **Compensation**

The proposal shall provide the fee proposal for the goods and/or services along with a proposed schedule of payments, proposed project schedule, and timeline.

H. **Additional Information**

Any additional information which the Consultant considers pertinent for consideration or that provides additional features or value should be included in a separate section of the proposal.

13. **PROPOSAL – Procedural Information**

Interviews:

CCLA reserves the right to conduct personal interviews or require presentations prior to selection. CCLA is not responsible for any expenses which the Consultant may incur in connection with a presentation for CCLA or related in any way to this RFP.

Request for Additional Information:

The Consultant shall furnish such additional information as CCLA may reasonably require. This includes information, which indicates financial resources, as well as ability to provide the services. Failure to provide additional information requested may result in disqualification of the proposal.

14. EVALUATION METHOD AND CRITERIA

CCLA shall be the sole judge of its own best interests, the proposals, and the resulting negotiated contract or agreement, if any. CCLA reserves the right to investigate the financial capability, reputation, integrity, skill, business experience and quality of performance under similar operations of each Consultant, including shareholders, principals and senior management, before making an award. Awards, if any, will be based on both an objective and subjective comparison of proposals and Consultants. CCLA's decision will be final. CCLA's evaluation criteria may include, but shall not be limited to, consideration of the following:

- A. Narrative describing methodology and scope of work (30 points)
- B. Experience and expertise (20 points)
- C. Technical merit and completeness of the proposal (5 points)
- D. Fee proposal (40 points)
- E. Small business / minority owned business (5 points)

15. REPRESENTATIONS AND WARRANTIES

In submitting a proposal, Consultant warrants and represents that:

- A. Consultant has examined and carefully studied all data provided, and any applicable addenda; receipt of which is hereby acknowledged.
- B. Consultant has reviewed www.lsc.gov for an overview of LSC's Technology Baselines. The Consultant is also satisfied as to all federal, state and local laws and regulations that may affect the cost and ability to perform the services specified in their proposal.
- C. Consultant has given CCLA written notice of all conflicts, errors, ambiguities, or discrepancies that Consultant has discovered in this RFP and any addenda thereto, and the written resolution, if possible, by CCLA is acceptable to Consultant.
- D. The RFP is generally sufficient in detail and clarity to indicate and convey understanding of all terms and conditions for the performance of the services to be performed.
- E. The Consultant will discuss the approach to using information gathered in the IT Technology Infrastructure Assessment and Security Audit to develop and implement the new IT infrastructure improvement plan.
- F. The IT Technology Infrastructure Assessment plan will be affordable, useful, and practical to implement. The assessment plan will successfully achieve stated goals.