



Request for Proposals (RFP)

LegalServer Optimization and SharePoint Integration Consultant

RFP Issue Date: July 15, 2025

Proposals Due: August 29, 2025

Contact for Inquiries and Submission:

Monica Glicken, CEO/Executive Director

Public Law Center

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I. INTRODUCTION

The Public Law Center (PLC), a 501(c)(3) nonprofit law firm, invites proposals from qualified consultants to (1) assess, optimize, and reconfigure our LegalServer case management system, and (2) oversee and support the integration of Microsoft SharePoint as our document management system in connection with LegalServer. This project will support our mission of providing high-quality, free civil legal services to low-income and vulnerable residents of Orange County, California.

II. ORGANIZATIONAL BACKGROUND

PLC provides free civil legal assistance to low-income residents in Orange County, California. Our areas of service include housing, immigration, family law, health, consumer, veterans, small business support, and federal tax disputes. We use LegalServer as our core case management system and Egnyte as our current document storage solution.

We are planning a migration from Egnyte to Microsoft SharePoint in February 2026 to improve file organization, collaboration, and security. While the migration itself is outside the scope of this project, PLC is seeking a consultant who can oversee the successful configuration and integration of LegalServer with SharePoint once that migration is complete.

III. PROJECT OBJECTIVES

LegalServer Optimization

- Evaluate current configuration, usage patterns, and workflows across PLC's legal units.
- Identify inefficiencies, redundancies, or underused features.
- Customize modules, forms, and reporting tools to better serve programmatic and compliance needs.
- Build or improve reports for internal management and external funder reporting.
- Provide staff training and a user manual for sustainable use and onboarding.

Overseeing the Integration between SharePoint and LegalServer

- Advise on and oversee configuration of LegalServer's SharePoint integration to support user access to case-related documents.

- Develop folder structures and automation rules within LegalServer to ensure correct document routing and access.
- Support user testing of SharePoint integration and troubleshoot any syncing or permissions issues.
- Coordinate with PLC's IT provider and LegalServer technical support during implementation.
- Provide staff training and written documentation for use of the LegalServer–SharePoint integration features.

IV. SCOPE OF SERVICES

LegalServer Optimization Tasks:

- Conduct discovery, stakeholder interviews, and system audit.
- Propose and implement configurations (modules, forms, processes).
- Develop reports (grants management, caseload, demographic, etc.).
- Recommend and implement improvements to integrations (e.g., calendar, Outlook).
- Train staff and deliver documentation.

SharePoint Integration Oversight Tasks:

- Evaluate options and best practices for integrating SharePoint with LegalServer.
- Collaborate with PLC's IT provider and LegalServer staff to configure integration.
- Test and troubleshoot SharePoint-related functionality within LegalServer.
- Document integration workflows and support knowledge transfer to system administrators.
- Train end-users and create support materials for ongoing use.

V. DELIVERABLES

1. LegalServer Configuration & Optimization Plan
2. Integration Setup and Testing Plan
3. Custom Reports Package for LegalServer
4. Written training guides and/or short instructional videos
5. Staff training sessions (live or recorded)
6. Final Implementation and Transition Summary Report

VI. PROPOSAL REQUIREMENTS

Please include the following in your response:

1. Overview of Consultant/Firm

- Legal name, address, primary contact, website
- Overview of relevant experience, particularly with legal aid and LegalServer

2. Project Understanding and Approach

- Approach to LegalServer optimization
- Experience with LegalServer–SharePoint integration or similar document system integrations
- Timeline and project plan

3. Team Qualifications

- Roles and bios of team members involved
- Relevant certifications or experience (especially with LegalServer, SharePoint, nonprofit legal

services)

4. Work Samples

- Examples of previous similar projects (case studies, screenshots, documentation)

5. References

- At least three references, preferably from legal aid organizations or nonprofits

6. Budget

- All-inclusive fee, broken down by deliverables/project phases, staff hours, and any variable expenses
- Suggested range: \$25,000-35,000

VII. TIMELINE

Milestone	Date (Estimated)	
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RFP issued	July 15, 2025	
Proposals due	August 29, 2025	
Award decision	September 29, 2025	
Project start	October 6, 2025	
Project completion (target)	March 7, 2026	

VIII. SELECTION CRITERIA

Proposals will be evaluated based on:

- Demonstrated experience with LegalServer and SharePoint
- Understanding of legal aid workflows
- Quality and clarity of proposed approach
- Team qualifications
- Cost-effectiveness
- References and past performance

IX. SUBMISSION INSTRUCTIONS

Submit proposals by **August 30, 2025** to:

Monica Glicken

CEO/Executive Director and General Counsel

Public Law Center

Email: mglicken@publiclawcenter.org

Subject: RFP Submission – LegalServer & SharePoint Integration Consultant