



**The New York State Interest on Lawyer Account Fund ("IOLA")
420 Lexington Ave. Suite 607
New York, New York 10170**

REQUEST FOR PROPOSALS (RFP)

FOR

**JUSTICE INFRASTRUCTURE PROJECT
PROJECT MANAGEMENT CONSULTANT SERVICES
RFP #2026-1**

PROPOSAL DUE DATE – JULY 1, 2026 NO LATER THAN 4:00 PM E.S.T.

FOR ADDITIONAL INFORMATION, CONTACT:

Kristen Thompson

kthompson@iola.org

SECTION 1 ADMINISTRATIVE INFORMATION

A. INTRODUCTION:

The New York State Interest on Lawyer Account Fund ("IOLA" or "IOLA Fund") is seeking proposals from qualified applicants to perform program-level project management consultant service to support the implementation, scaling, and governance maturation of the Justice Infrastructure Project (JIP) following completion of Phase 2 planning and initial design activities.

It is anticipated that one contract will be awarded with an initial term of one (1) year, with four one-year optional renewals.

B. THE IOLA FUND: HISTORY AND MISSION

IOLA's mission is to support qualified non-profit organizations throughout New York State that will most efficiently and effectively provide stable, economical, and high quality civil legal representation to eligible clients to improve the administration of justice.

IOLA generates revenue from interest earned on New York lawyers' IOLA trust accounts. In 1983, IOLA was established by the New York State Legislature and is administered by a fifteen-member Board of Trustees appointed by the Governor. The Trustees are assisted by a staff on eleven full-time employees located in New York City. IOLA provides millions of dollars in grants for providers of civil legal aid to low-income New Yorkers, furthering the goal of equal access to justice for all. As of FY26, IOLA has 87 grantees.

C. ABOUT THE JUSTICE INFRASTRUCTURE PROJECT

Consistent with its mission to ensure that every New Yorker with a civil legal problem has clear and timely access to high-quality legal information, advice, and representation, the IOLA Fund initiated the [Justice Infrastructure Project \(JIP\)](#) in 2023. JIP is a multi-year initiative intended to enhance, strengthen, and modernize New York's civil legal services ecosystem by addressing persistent challenges within the system, including:

1. the difficulty individuals face in identifying appropriate sources of legal assistance;
2. capacity constraints that limit the ability of legal aid organizations to provide sufficient legal information, advice, or representation; and
3. inefficiencies caused when individuals seek assistance from multiple organizations that may not be best suited to address their legal needs.

D. DESIGNATED CONTACT:

The IOLA contact for this RFP is:

Contact: Kristen Thompson
 420 Lexington Ave. Suite 607
 New York, New York 10170
kthompson@iola.org

All communications during the RFP process shall be directed to the Designated Contact. Communication with any other IOLA employee or any incumbent company for the goods or services being procured pursuant to this RFP may be cause for disqualification from the RFP process.

IOLA shall not be responsible for any oral instructions made by any employees or officers of IOLA regarding this RFP. Any changes to the RFP instructions, requirements, or scope of services shall be in the form of a written amendment, which will be furnished to all applicants through the New York State Contract Reporter.

E. RFP DEADLINES:

- a. **Questions** shall be submitted via email to the contact identified in Paragraph D, “DESIGNATED CONTACT.” The deadline for submission of questions is June 17, 2026, at 12:00 PM E.S.T. IOLA will develop responses to the technical questions as appropriate. Responses will be issued by IOLA on its website www.iola.org.
- b. **Proposal Due Date** is July 1, 2026, no later than 4:00 PM E.S.T.

F. SELECTION PROCESS:

IOLA will evaluate the proposals through a point rating system, set forth below in Paragraph G below. The final selection will be the applicant determined to represent the best value to the IOLA Fund and the State of New York.

G. AWARD CRITERIA:

Proposals will be evaluated and ranked based on the award criteria below which is further described in SECTION 2 – AWARD CRITERIA:

Criteria	Points
Organizational Capacity	10
Project Workplan	30
Relevant Expertise, Experience, & Past Performance References	30
Service Quality	20
Cost Proposal	20
Total Points Available	100

H. PROPOSAL SUBMISSION:

a. **Submission:**

Proposals must include the entire package. IOLA is only accepting electronic proposals via email. Electronic proposals shall be emailed in PDF format before the RFP Due Date and Time to kthompson@iola.org. Faxed proposals will not be considered.

Applicants shall clearly identify any portions of their proposal that contain proprietary information or trade secrets. Any such information will be handled in accordance with applicable laws, including the New York Freedom of Information Law (FOIL).

Submission of a proposal shall be deemed to grant IOLA the right to use and disclose the contents of the proposal for purposes of evaluation, contract award, and administration, subject to applicable confidentiality protections. Absent such identification, IOLA reserves the right to treat all proposal materials as non-confidential.

b. **Proposal Format:**

Proposals shall include the information requested below and in the order listed. Each section and sub-section must be separated by a cover page that clearly identifies/labels each section. In addition, pages shall be numbered. Proposals shall be signed by an employee of the vendor who is authorized to sign the Proposal.

A proposal shall include the necessary information needed to establish the Applicant's background, expertise, and qualifications to provide the services as set forth in the Scope of Services. Services and cost proposals shall reflect and include the necessary level of effort required to complete all the services outlined in the RFP. It is recommended that Applicants limit their proposals to twenty (25) pages, excluding resumes and forms. In case of error in the extension of prices in the cost proposal, the unit price will govern. Periods of time, stated as a number of days, shall be calendar days.

1. **Table of Contents:** A Proposal Checklist has been provided at the end of this Section One – Administrative Information, to assist with the assembly and ensure completeness of the proposal package. This Proposal Checklist must be included as the first item of the Proposal.
2. **Minimum Eligibility:** This is a **Pass or Fail** requirement. Applicants must meet all the following criteria to be considered.
 - i. Licensed to do business in New York State

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- ii. Holds Workers' Compensation and Disability Insurance
 - iii. Has completed and certified a [Vendor Responsibility Questionnaire](#) in the last six months.
 - iv. Ability to meet in person and virtually with civil legal services providers
 - v. Ability to present to IOLA's Board of Trustees, in-person or virtually
 - vi. Ability to present in person or virtually at relevant conferences in New York State
3. Technical & Cost Proposal:
 - i. Organizational Capacity
 - ii. Project Workplan
 - iii. Relevant Expertise, Experience, and Past Performance References
 - iv. Service Quality
 - v. Cost Proposal
 4. Acknowledgement of Addenda, if applicable
 5. Comments or proposed changes to the Terms and Conditions or Form of Contract: A lack of comments will be considered full acceptance of the contract terms on the part of the firm. Applicant should identify any terms and conditions not set forth in the Form of Contract.
 6. Supplemental Information (Optional): Include any brief supplemental information that may be relevant to your qualifications for the work.

Note: Failure to submit any of the required documents may deem the Applicant nonresponsive.

I. RFP TERMS AND CONDITIONS:

- a. The RFP document and all relevant documentation, including any addenda, can be accessed through the New York State Contract Reporter.
- b. Any and all contracts created as a result of this RFP shall be governed by the laws of the State of New York except where otherwise prohibited by law.
- c. Lobbying Prohibition: State Finance Law §139-J and §139-K restrict applicants from making contact with the procuring governmental entity with the intent to influence the governmental entity's conduct or decision regarding the governmental procurement (unless it is a contact within the statutory exceptions set forth in State Finance Law §139-J (3)(a)). Violations of the procurement lobbying rules can result in findings of nonresponsibility that can result in rejection of contract award and, in the event of two findings within a 4-year period, an applicant may be debarred from obtaining any governmental Procurement Contracts.
- d. Proposals must be signed. Proposals must be completed in the Applicant's legal name and must be signed by a person authorized to do so.
- e. By signing and submitting your Proposal, Applicant affirms that it has read this RFP, accepts its terms and is able and willing to sign the contract if the Applicant's proposal is accepted, subject only to any changes negotiated and agreed upon by both parties. The issuance of a letter of intent to award or similar document does not require or commit IOLA to enter into a contract until all terms and conditions are negotiated and acceptable to IOLA. In the event of any inconsistencies between the Proposal and the RFP, the language of the RFP will prevail unless there is a written agreement to accept the Proposal's terms.
- f. It is IOLA's intent to select the Applicant that represents the best value to the IOLA Fund and the State of New York. The final selection of the Applicant will be made by the IOLA Board of Trustees.
- g. The RFP and the Applicant's response to this RFP, as may subsequently be modified in negotiations with the IOLA Fund, may be included as exhibits in any contracts that the IOLA may execute with the Applicant.
- h. IOLA reserves the right to amend this RFP, to reject any or all of the proposals or any part thereof, submitted in response to this RFP, and reserves the right to waive informalities, if such action is deemed to be in the best interest of IOLA. IOLA reserves the right to request additional information from any Applicant. The submission of a proposal gives permission to IOLA to make inquiries concerning the

applicant and its principals, officers and directors to any persons or entities IOLA deems appropriate.

- i. This RFP is not intended and shall not be construed to commit IOLA to pay any costs incurred in connection with any proposal or to procure or contract for any services.
- j. The decision to award a contract shall be based on the Applicant's ability to provide quality services and products and to comply with all applicable laws, rules and regulations. The Applicant shall comply with all applicable Federal, State, and local laws, regulations, and requirements, including those related to labor, employment, and workplace safety, in the performance of services under this RFP.
- k. Prior Applicant performance in regard to product, service, or representation of/from the Applicant may be used in evaluation of this offer. Unsatisfactory performance to IOLA may be considered sufficient grounds for rejection of this offer. No offer will be awarded to any Applicant that is in default on any contract with IOLA.
- l. Each Proposal will be examined to determine whether it is responsive to the requirements of this RFP. All responsive proposals will be evaluated in accordance with the criteria set forth herein.
- m. While IOLA is under no obligation to contact Applicants for clarification, it reserves the right to do so.
- n. It is agreed that the Applicant shall be fully responsible for making any correction, replacement, or modification necessary for specification or legal compliance.
- o. It is expressly understood that IOLA shall not be construed or be held to be a partner, agent or associated by joint venture or otherwise of contractor in the conduct of its business.
- p. All materials and documentation developed under this agreement shall be the exclusive property of IOLA.
- q. Applicant's Sexual Harassment Policy. By submission of a proposal, each applicant and each person signing on behalf of any applicant certifies, and in the case of a joint proposal submission each party thereto certifies as to its own organization that the applicant(s) has/have implemented a written policy addressing sexual harassment prevention in the workplace and provides annual sexual harassment prevention training to all of its employees. Such policy shall, at a minimum, meet the requirements of New York Labor Law Section 201-g.

- r. **Debriefing Opportunity.** A debriefing is available to any unsuccessful applicant, which should be requested in writing to kthompson@iola.org within 15 calendar days of the applicant's notification of non-award. A debriefing will be scheduled within 10 calendar days of IOLA's receipt of the written request or as soon thereafter as may be practicable under the circumstances. Any bid protest should be submitted to the Office of the State Comptroller pursuant to 2 NYCRR Part 24.1.

J. CONTRACT TERMS AND CONDITIONS

- a. **Choice of Law and Standard Clauses for New York State Contracts:** The contract shall be governed by the laws of the State of New York except where otherwise prohibited by law.

This contract is subject to the terms and conditions of [Appendix A – Standard Clauses for New York State Contracts](#), which is incorporated by reference herein.

- b. **Invoicing:** Contractor shall submit complete and accurate invoices to the IOLA Fund in accordance with the requirements of the Contract and the Office of the State Comptroller. The Contractor shall provide any information requested by IOLA or the Office of the State Comptroller to verify the accuracy of any invoice.
- c. **Payments of Contract Purchases:** Contractor agrees that payments for invoices submitted by the Contractor shall only be rendered electronically unless payment by paper check is expressly authorized by IOLA, in IOLA's sole discretion, due to extenuating circumstances. Such electronic payments shall be made in accordance with ordinary State procedures and practices. The Contractor shall comply with the State Comptroller's procedures to authorize electronic payments. Authorization forms are available at the State Comptroller website at www.osc.state.ny.us, by e-mail at HelpDesk@sfs.ny.gov, or by telephone at (518) 457-7737 or toll free (877) 737-4185. Contractor acknowledges that it will not receive payment on any invoices submitted under this Contract that are payable by IOLA if it does not comply with the State Comptroller's electronic payment procedures, except where IOLA has expressly authorized payment by paper check as set forth above.
- d. **Key Personnel:** Key personnel changes of the Contractor require prior written approval by IOLA.
- e. **Data Security and Confidentiality Requirements:** Contractors that receive or access IOLA data, including banking information, interest remittance and revenue data, attorney IOLA account data, or sensitive organizational information, must comply with all applicable confidentiality, privacy, and cybersecurity requirements

of the IOLA Fund. Contractors shall implement reasonable administrative, technical, and physical safeguards appropriate to the nature of the data and the risk of unauthorized access or disclosure.

- f. **Independent Contractor Status:** It is understood and agreed that the legal status of the Contractor, its Subcontractors, agents, officers and employees under this Contract is that of an independent contractor, and in no manner shall they be deemed employees of the IOLA Fund and therefore are not entitled to any of the benefits associated with such employment.
- g. **Insurance:** The Contractor shall maintain, throughout the term of this Contract, current Workers' Compensation and Disability Benefits insurance coverage, with the IOLA Fund named as the certificate holder. The State requires the following form types (not the "Acord" form):
 - 1. Worker's Comp: C105.2 or U26.3
 - 2. Disability: DB-120.1
- h. **Subcontractors and Suppliers:** The IOLA Fund reserves the right to reject any proposed Subcontractor or supplier for bona fide business reasons, including, but not limited to: the Subcontractor failed to solicit New York State certified minority- and women-owned business enterprises, if required; the fact that such Subcontractor or supplier is on the New York State Department of Labor's list of companies with which New York State cannot do business; the IOLA Fund's determination that the Subcontractor is not qualified or is not responsible; or the fact that the Subcontractor has previously provided unsatisfactory work or services. Additionally, the IOLA Fund reserves the right to reject or require the replacement of any proposed Subcontractor whose involvement presents a conflict of interest with IOLA's agency operations or fiduciary responsibilities. The Contractor shall disclose all subcontracting relationships upon request and ensure that all approved Subcontractors comply with the terms of the Contract.
- i. **Consultant Disclosure:** State Finance Law requires that Contractors annually report certain employment information to the contracting agency, the Department of Civil Service (DCS) and OSC utilizing Form B of the State Consultant Services Contractor's Annual Employment Report (AC 3272-S). The reports will be due no later than May 15th of each year.

Form B should be completed in accordance with the following:

 - i. **Scope of Contract:** a general classification of the single category that best fits the predominate nature of the services provided under the contract.

- ii. **Employment Category:** the specific occupation(s), as listed in the O*NET occupational classification system, which best describe the employees providing services under the contract. (Note: Access the O*NET database, which is available through the US Department of Labor's Employment and Training Administration, on-line at <https://www.onetonline.org> to find a list of occupations.)
- iii. **Number of Employees:** the total number of employees in the employment category employed to provide services under the contract during the report period, including part-time employees and employees of subcontractors.
- iv. **Number of hours (to be) worked:** the total number of hours worked during the report period by the employees in the employment category.
- v. **Amount Payable under the Contract:** the total amount paid or payable by the State to the state contractor under the contract, for work by the employees in the employment category, and for services provided during the report period.

Reports may be submitted to IOLA by either method listed below:

By email (preferred method): Please send a signed, scanned copy to Kristen Thompson at kthompson@iola.org with "Consultant Disclosure Form B" in the subject line.

or

By mail:

IOLA Fund of the State of New York
420 Lexington Avenue,
Room 607
New York, NY 10170
Attn: Director of Administration

- j. **Contract Modifications or Amendments:** The Contract may only be modified or amended upon mutual written agreement of IOLA and Contractor. The Contractor may, however, offer IOLA more advantageous pricing, payment, or other terms and conditions than those set forth in the Contract. In such event, a copy of such terms shall be furnished to IOLA by the Contractor at the time of such offer. Other than where such terms are more advantageous for IOLA than those set forth in the Contract, no alteration or modification of the terms of the Contract, including substitution of product or services, shall be valid or binding against IOLA unless authorized by IOLA or specified in the Contract. No such alteration or modification shall be made by unilaterally affixing such terms to any product upon delivery (including, but not limited to, attachment or inclusion of standard pre-printed order forms, product literature, "shrink wrap" terms accompanying software upon

delivery, or other documents) or by incorporating such terms onto order forms, Purchase Orders or other documents forwarded by the Contractor for payment, or through verbal agreements, informal communications or assumptions, notwithstanding IOLA's subsequent acceptance of the product or services, or that IOLA has subsequently processed any document from Contractor for approval or payment.

TABLE OF CONTENTS

Note: This form MUST be included in your proposal as the Table of Contents and PROPOSAL MUST BE SUBMITTED IN THE ORDER LISTED BELOW

Please check if it is included or N/A

Tab	Item	Yes	No	N/A
1	Table of Contents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Introductory Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Minimum Eligibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Technical Proposal (1) Organizational Capacity (2) Project Workplan (3) Relevant Expertise, Experience, and Past Performance References (4) Service Quality (5) Cost Proposal	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5	Acknowledgement of Addenda (If applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Comments Regarding RFP Terms and Conditions or Form of Contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Supplemental Information (Optional)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION 2

AWARD CRITERIA

Responses to the items set forth under each of the categories below will be used by the IOLA Fund to assess the appropriateness and relevance of the information provided in the proposals and make a recommendation for award. Failure to include information as requested under any of the subsections in the Proposal may result in the Applicant being disqualified. The responses to each of the categories must be separated by clearly labeled tabs into the sections and sub-sections identified below and reflected in the Table of Contents (form provided in Section One) of the Proposal submitted.

A. Technical Proposal:

(1) Organizational Capacity (3 pages)

- i. Applicant Overview: Description of the organization, years in business, and organizational structure.
- ii. Staffing Plan: Proposed team structure, roles and responsibilities, and level of effort (hours or % allocation if possible)
- iii. Key Personnel: Resumes of key staff, relevant certifications, and experience in similar program environments
- iv. Capacity to Perform: Description of current workload and ability to support this project and ability to support multi-year engagement.

(2) Project Workplan (10 pages)

Provide a draft Project Workplan and timeline for year one and for each option period that will accomplish the following:

- i. Identification of goals, implementation strategies, and measurable outcomes relevant to the Project;
- ii. Identification of and management plan for community stakeholders;
- iii. Convening and facilitating stakeholder meetings to generate content necessary to create ongoing stakeholder engagement feedback loop;
- iv. Assessment of the current civil legal services intake and referral landscape in New York State;
- v. Preparation of initial recommendations and reports for the IOLA Fund and its Board of Trustees to advance the Project goals, which may include draft evaluation plans, policies, and RFPs.

(3) Relevant Expertise, Experience, and Past Performance References (4 pages)

- i. Describe how long your business has been providing strategic consulting and project management services.

- ii. Describe any projects undertaken in support of civil legal aid.
- iii. Describe your experience managing broad initiatives to enhance civil access to justice at the national, regional, or state level.
- iv. Summarize examples of work provided to the civil legal services community in New York State, including prior work with the New York State Courts, civil legal services providers, and providers of legal information or other forms of assistance.
- v. Summarize examples of work that demonstrate your business' (and/or any individual staff members') experience:
 - conducting public surveys, roundtables, and focus groups related to civil access to justice.
 - engaging with diverse client communities with appropriate cultural competence.
 - successfully completing projects similar to IOLA's proposed Project, as demonstrated through quantifiable metrics.
- vi. Optional: Provide links to publications and presentations by your business and/or any individual staff members relevant to civil legal aid. (e.g., public comment or testimony, conference presentations, committee or taskforce participation).
- vii. Provide client references (2–3 minimum).

(4) Service Quality (3 pages)

- i. Address approach to managing the Justice Infrastructure Project and methodology for governance coordination, implementation planning, and stakeholder engagement
- ii. Provide project management methodology frameworks used and approach to scheduling, tracking progress, and managing dependencies
- iii. Address how risks will be identified, tracked, and mitigated
- iv. Provide the approach/strategy to managing multiple vendors, avoiding duplication, and ensuring alignment with the Justice Infrastructure Project
- v. Provide the approach to documentation, knowledge transfer, and continuity over multi-year period

Cost Proposal:

Applicants shall provide an all-inclusive fee for each contract year covering all services described in Section 3- Scope of Services, including but not limited to:

1. Governance & Program Coordination
2. Implementation Planning & Execution Support
3. Vendor & Stakeholder Coordination
4. Risk, Issue & Performance Management
5. Documentation & Program Management Support
6. Deliverables

In addition to the summary provided below, Applicants shall provide a schedule of costs including employees assigned to the project, associated hourly rates, and total number of hours. The schedule and below summary shall be inclusive of any rate increases over the term of the contract.

Contract Term – Periods of Performance		Maximum Annual Fee
Initial Term:	10/01/2026 to 09/30/2027	\$ _____
Renewal Option One:	10/01/2027 to 09/30/2028	\$ _____
Renewal Option Two:	10/01/2027 to 09/30/2028	\$ _____
Renewal Option Three:	10/01/2027 to 09/30/2028	\$ _____
Renewal Option Four:	10/01/2027 to 09/30/2028	\$ _____
Total		\$ _____

Notes:

- Fees shall be inclusive of all labor, overhead, travel, technology, administrative costs, and out-of-pocket expenses.

Additional Services: All additional services shall require a written proposal and cost estimate from the contractor and must be authorized in writing, via a contract modification, by IOLA, the Attorney General, and OSC prior to commencement. IOLA reserves the right to cap or decline additional services at its sole discretion.

SECTION 3 SCOPE OF WORK

JUSTICE INFRASTRUCTURE PROJECT – PROJECT MANAGEMENT CONSULTING SERVICES

1. Project Purpose

The purpose of this contract is to provide comprehensive program management and coordination services to support the continued development, implementation, and sustainment of the [Justice Infrastructure Project \(JIP\)](#) as it progresses through Phase 3 and subsequent phases.

This scope is intended to support governance structures, coordinate stakeholders, manage implementation activities, and provide ongoing program management across the lifecycle of the project.

2. Scope Context

Phase 1 and Phase 2 have been completed, and the project is currently operating within Phase 3. This contract includes support for ongoing implementation, operational maturation, and potential expansion of statewide initiatives, as defined and approved by IOLA. The contractor shall support both current initiatives and future program needs, as directed by IOLA.

3. Core Services

During the period of performance, the contractor shall provide the following services:

A. Governance & Program Coordination

- Facilitate and coordinate stakeholder meetings across governance bodies
- Maintain governance structures, including roles, responsibilities, and decision-making frameworks
- Document decision pathways, action items, and escalation processes
- Ensure alignment with IOLA leadership and Board direction
- Support development and refinement of governance models as the program evolves

B. Implementation Planning & Execution Support

- Develop, maintain, and update short-term and long-term implementation roadmaps
- Support execution of program initiatives across multiple phases
- Identify dependencies, risks, and resource requirements
- Assist IOLA in prioritizing and sequencing program activities

- Support scaling of initiatives beyond initial implementation where applicable

C. Vendor & Stakeholder Coordination

- Support and coordinate with vendors currently under contract with IOLA
- Facilitate cross-vendor communication and integration
- Support onboarding and coordination of new vendors as needed
- Ensure alignment of vendor deliverables with program objectives
- Support performance monitoring of vendor activities
- Assist IOLA in evaluating vendor performance

D. Risk, Issue & Performance Management

- Develop and support mitigation strategies
- Track and report on program performance and key milestones
- Elevate critical risks and policy-level issues to IOLA leadership
- Support development of performance metrics and reporting frameworks

E. Documentation & Program Management Support

- Maintain comprehensive program documentation
- Develop reports, summaries, and materials for leadership and stakeholders
- Support audit readiness and compliance documentation
- Organize and maintain program artifacts to ensure continuity

F. Deliverables

Deliverables may include, but are not limited to:

- Program management plans and implementation roadmaps
- Governance documentation and updates
- Performance and status reports
- Ad hoc reporting through written materials and presentations to IOLA and its Board of Trustees
- Meeting materials, summaries, and decision records
- Vendor coordination and integration documentation

Deliverables shall be developed collaboratively with IOLA and may evolve over the period of performance; however, reporting should occur no more frequently than quarterly

G. Role of the Contractor

The contractor shall:

- Serve in a program management and coordination capacity
- Operate under the direction of IOLA leadership

- Provide recommendations and support implementation activities
- Not assume policy-making authority
- Support execution of program initiatives as directed by IOLA

H. Transition Support

The contractor shall support transition activities throughout the life of the contract, including:

- Maintaining organized and accessible program documentation
- Supporting knowledge transfer to IOLA staff and/or successor contractors
- Assisting in transition planning at contract completion, if applicable.

I. Term of Contract - Period of Performance

A. Initial Term: This contract shall commence upon the start date indicated in the contract or upon approval by the New York State Office of the State Comptroller (OSC), whichever is later. The initial period of performance shall be for one (1) one-year period as follows:

Initial Term: 10/01/2026 to 09/30/2027

B. Renewal Options: IOLA reserves the right, at its sole discretion, to renew this contract for up to four (4) additional one-year periods. The renewal periods are as follows:

Renewal Option One: 10/01/2027 to 09/30/2028

Renewal Option Two: 10/01/2028 to 09/30/2029

Renewal Option Three: 10/01/2029 to 09/30/2030

Renewal Option Four: 10/01/2030 to 09/30/2031

C. Conditions for Renewal: Renewal options shall be exercised subject to the following:

- a. Mutual Consent or Sole Discretion:** Renewals may be executed at the sole discretion of IOLA and the State or upon mutual written agreement of both parties.
- b. Performance:** Successful renewal is contingent upon the Contractor's satisfactory performance during the preceding term.
- c. Funding:** All renewals are subject to the continued availability of funds as required by State Finance Law.
- d. OSC Approval:** Any renewal extension shall not be effective until it has been formally approved by the Office of the State Comptroller.

D. Notice of Renewal: IOLA will provide the Contractor with written notice of its intent to renew no later than 90 calendar days prior to the expiration of the then-current term.



Justice Infrastructure Project Project Management Consultant Services

Minimum Eligibility Form

I affirm that the business entity named below is licensed and authorized to do business in New York State	YES <input type="checkbox"/>	NO <input type="checkbox"/>
I affirm that the business entity named below holds Workers' Compensation and Disability Insurance	YES <input type="checkbox"/>	NO <input type="checkbox"/>
I affirm that the business entity named below has completed and certified a Vendor Responsibility Questionnaire in the last six months.	YES <input type="checkbox"/>	NO <input type="checkbox"/>
I affirm that the business entity named below has the ability to meet in person and virtually with civil legal services providers.	YES <input type="checkbox"/>	NO <input type="checkbox"/>
I affirm that the business entity named below has the ability to present to IOLA's Board of Trustees, in-person or virtually	YES <input type="checkbox"/>	NO <input type="checkbox"/>
I affirm that the business entity named below the ability to present in person or virtually at relevant conferences in New York State	YES <input type="checkbox"/>	NO <input type="checkbox"/>

Business Entity: _____

Name: _____

Signature: _____

Title: _____

Date: _____