



Request for Proposals (RFP)

Statewide Knowledge Platform

**SUBMISSION VIA THE STATEWIDE FINANCIAL SYSTEM ONLY
PAPER APPLICATIONS WILL NOT BE ACCEPTED**

**DEADLINE: 12 P.M. (NOON) Eastern Time, July 30, 2026
LATE APPLICATIONS WILL NOT BE ACCEPTED**

Applicants are strongly urged to submit applications at least 48 hours in advance of the deadline to allow for uploading information and documents to the Statewide Financial System (SFS).

420 Lexington Avenue, Room 607, New York, NY 10170

(646) 865-1541

iola.org

APPLICATION OVERVIEW

A. The IOLA Fund

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 of eleven full-time employees located in New York City. IOLA provides millions of dollars in grants to 87 organizations that provide civil legal aid to low-income New Yorkers, furthering the goal of equal access to justice for all. For more information about these programs, visit [IOLA's website](#).

B. About the Justice Infrastructure Project

In December 2023, IOLA launched the [Justice Infrastructure Project](#) (JIP). Consistent with IOLA’s mission, the JIP seeks to ensure that every New Yorker with a legal problem has clear and timely access to high quality legal information, advice, and representation. To achieve this goal, the JIP has two primary functions: Support, Knowledge, and Information for Legal Services Organizations and Legal Information and Referral for the Public.

Over the past two years, IOLA has worked with New York legal services organizations, community-based organizations, national experts, consultants and other stakeholders to further develop key considerations for both functions. This included establishing two sets of Consulting Groups, the most recent of which met for six months to develop the [Legal Information and Referral for the Public: Consulting Group Recommendations](#) for IOLA’s consideration.

C. About this Grant Opportunity

IOLA seeks to fund the development of a **Statewide Knowledge Platform** of legal services resources and available assistance throughout New York State. Infrastructure, process, and collaboration is needed so the collective knowledge of legal aid lawyers can help the public, even if they are not able to interact with a lawyer directly. Recent advancements in technology, and those advancements on the horizon, provide new opportunities to create scalable, collaborative knowledge management solutions that can improve referrals to legal aid organizations and provide accessible, interactive, guided information to people who are seeking help but are not able to access a lawyer. Such a “knowledge backbone”—accessible by legal aid providers, advocates, and the public, with varied interfaces customized to the different user types—would

improve the efficiency of legal aid service delivery and enable the development of legal information tools to serve the public at scale.

IOLA has incorporated the findings and recommendations derived from the stakeholder engagements and Consulting Groups into this Request for Proposals (RFP), through which IOLA plans to award one grant to one nonprofit organization to plan, build, implement, and scale a statewide knowledge platform to make reliable and consistent legal information accessible and available across New York State, including for all IOLA grantees, which would include the Training Center, Comprehensive & Dynamic Legal Services Directory, and the Justice Infrastructure Project Governance. Content may include diagnosis of legal problems, legal subject-matter information, guidance on court filing and procedures, and updates to federal, state, and local laws. The grant recipient must actively engage the legal services community in this project and may have existing or planned partnership arrangements. Grant funds may be used to compensate such partners.

D. Available Funding and Term

The IOLA Fund plans to award one Simplified Renewal Agreement which includes a one-year initial period for up to \$2,500,000 plus two, one-year optional renewals for up to \$1,000,000 each year for a total amount of \$4,500,000, if the options are exercised. Awards are subject to available IOLA funding, the [State of New York Contract for Grants](#), and the IOLA Fund's appropriation under the NYS Budget.

1. **Initial Term:** The initial period of performance shall be for one (1) one-year period from 11/01/2026 to 10/31/2027.
2. **Renewal Option:** IOLA reserves the right, at its sole discretion, to renew this contract for two additional one-year periods from 11/01/2027 to 10/31/2028 and 11/1/2028 to 10/31/2029.

E. Scope of Services

This project envisions that the selected Contractor will be responsible for the following components of the Statewide Knowledge Platform:

1. Technical approach & system design, including data integration across multiple platforms and tools, real-time updates, and ability to increase functionality over time;
2. Stakeholder engagement & collaboration, which are foundational aspects of the justice infrastructure project;
3. Sustainability & maintenance, including the planning to support future investments and governance of the project
4. Launch approach, including testing, implementing, and scaling, tracking technical and user-based metrics; and

5. Adaptive management, system maintenance, and sustainability, supporting the path toward future functions, resources, and investments.

F. Eligibility

Organizations qualified to receive IOLA grants must meet all of the following:

- Be non-profit entities, tax exempt under section 501(a) of the Internal Revenue Code;
- Have “current” registration with the NYS Charities Bureau;
- Operate within New York State;
- Hold Workers’ Compensation and Disability Insurance;
- Have an audit mechanism that provides accountability for IOLA funds; and
- Agree to satisfy, on a timely basis, all of IOLA’s reporting requirements.

G. 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-K(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 2-year period, an applicant may be debarred from obtaining any governmental Procurement Contracts.

H. Right to Use

Applicants shall clearly identify any portions of their application 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) pursuant to FOIL§87(2) and the basis for the protection, including any relevant legal authority.

Submission of an application shall be deemed to grant IOLA the right to use and disclose the contents of the application for purposes of evaluation, award, and administration, subject to applicable confidentiality protections. Absent such identification, IOLA reserves the right to treat all proposal materials as non-confidential. IOLA has the right to adopt, modify, or reject any or all ideas presented in response to this RFP.

I. Questions & Answers

Any and all questions regarding the application process must be submitted via the following Microsoft Form: <https://forms.office.com/r/hxJTaRd4Md> on or before 4:00 pm, July 17, 2026. Oral questions will not be accepted or answered. Questions received after the deadline may not

be answered. IOLA will post on its [Grantee Resources webpage](#) a final and comprehensive list of all questions and answers by July 23, 2026.

APPLICATION CONTENTS, SUBMISSION, AND INSTRUCTIONS

General Submission Instructions

To be considered, all applicants must submit a complete application via the Statewide Financial System (SFS) by the posted deadline. For an application to be considered, applicants must be “Prequalified” in SFS as of the posted deadline for applications.

See the following New York State Grant’s Management webpage for more information on becoming Prequalified in SFS: <https://grantsmanagement.ny.gov/get-prequalified>. New York State reserves 5-10 business days from the receipt of complete Prequalification applications to conduct review. If supplementary information or updates are required, review times may be longer. We advise applicants plan accordingly and Prequalify as soon as possible.

The application on SFS consists of a series of Pages where applicants will be prompted to answer questions and upload responsive documents. Each Page should be saved as it is completed; the entire application need not be completed in one sitting. Applicants seeking to resume work on a partially completed application should go to the SFS home page and access their application in the “Grants Management – State” tile through either the “Bid Event Search” or the “Bid Response Search” (Funding Agency: IOL01, Event ID: IOL-KP27). Once all the Pages are finished and all the necessary documents are uploaded, an applicant should “submit” the application.

IMPORTANT NOTE: Only individuals designated with the SFS role of “**Bid Response Submitter**” are authorized to submit applications via SFS. Please review your designated role before preparing your application. Forward all SFS questions to helpdesk@sfs.ny.gov or call 855-233-8363. Please note the SFS Helpdesk may take several business day to respond to inquiries and plan accordingly.

Professional Judgment: Where actual data is not available, applicants should use best estimates based on available data and their professional judgment.

Additional Pages: Do not submit any additional materials beyond those requested. Cited information (e.g., hyperlinks to websites or photos) may not be considered. Footnotes and endnotes are permitted but count toward the page limits.

Program Information

See instructions below for SFS fields and how to upload narrative responses.

Under “Step 1”, in the Bidder Contact Information section, enter the name, email, and telephone of the best contact person for the application. Click “Site/Project Address” link to enter the address of your organization’s main administrative office. This information must be entered before saving the page.

The **Event Questions** will prompt you to provide narratives of the following:

1. Organizational Capacity
2. Description of Statewide Knowledge Platform
3. Financial Narrative
4. Work Plan Narrative

Please draft and then upload documents responsive to each question, adhering to the indicated page limits and incorporating the headings referenced below (single-spaced, one-inch page margins, 12-point font.) All documents must be uploaded in PDF file format.

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1. Organizational Capacity (up to 5 pages)

- a. **Principal Activities & Structure:** Describe your organizational structure, mission, and core competencies, identifying key personnel who will be assigned to this project. Describe the organizational structure and planning and priority setting processes. Include board composition, relevant experts, and client/community involvement.
- b. **Relevant Experience:** Describe your relevant experience managing complex technology or infrastructure projects, particularly those involving data integration, interoperability, or multi-stakeholder coordination. Prioritize examples of prior experience working with civil legal services providers, access to justice initiatives, or similarly structured service networks. Describe qualifications of key staff. Describe examples of prior projects demonstrating experience in designing, developing, or implementing technology systems, data integration platforms, knowledge management systems and / or interoperable infrastructure should highlight scope, complexity, stakeholders involved, timelines and outcomes.

2. Description of Proposed Statewide Knowledge Platform (up to 30 pages)

a. Technical Approach & System Design:

Describe the proposed system architecture and technical approach for developing a statewide knowledge management system with contributions from legal services organizations across the state. Include the following components:

- How the system will integrate data across multiple platforms and tools (including LegalServer, a case management system in broad use by New York State legal services providers), support real-time updates, and ensure ease of use for participating organizations and the public;
- Data governance, system security, and privacy;
- How the system will be designed for scalability and future expansion, including the ability to incorporate additional contributors and user types, systems, or functionalities over time;
- How the proposed system will support incremental development, including the ability to launch with limited functionality and expand over time without requiring major redesign; and
- How the system architecture will accommodate increasing data volume, additional users, and integration with future systems.

b. Stakeholder Engagement & Collaboration

Describe your strategy for engaging legal services providers, community-based organizations, and other stakeholders throughout the design, implementation, and ongoing use of the system. Include the following components:

- A plan to encourage adoption and sustained participation across the legal services community. Describe how you would coordinate with organizations leading related justice infrastructure initiatives and incorporate stakeholder feedback into system development and improvement;
- How the stakeholders will be engaged during both the launch and testing phase and subsequent expansion, including how feedback will be collected, evaluated, and incorporated into systems improvement; and
- Strategies for building trust and adoption, by legal services organizations and the public, during early implementation and expanding participation over time.

c. Sustainability & Maintenance:

Identify the needs for continued maintenance and governance of the knowledge infrastructure, user interfaces and related processes, to aid with determining future investments that may be made through a separate RFP process. Include the following components:

- How sustainability planning will evolve as the system scales, including how resource needs, governance, and support models may change over time; and
- Long-term ownership of the system as it transitions over time.

d. Launch Approach: Testing, Implementing, and Scaling:

Describe your proposed approach to the initial launch, testing, and scaling of the project. Include the following components:

- Design: Describe the proposed launch phase, including size, geographic scope (e.g., region(s) of New York), types of participating organizations, subject area(s), and rationale for selection;
- Initial Strategy: Identify the core features and capabilities that will be prioritized for the initial launch;
- Adaptability: Describe how the system and implementation approach will accommodate evolving needs, stakeholder feedback, and changes in scope over time; and
- Success Metrics: Propose metrics for evaluating launch success and readiness for expansion.

e. Adaptive Management Approach:

Describe how you will manage a project where requirements and scope may evolve, including use of iterative development (e.g., agile or phased approaches), methods of prioritizing enhancements, and governance for decision-making as the project expands.

3. Financial Narrative (up to 5 pages)

a. Expenses: Provide an overview of the anticipated expenses of your proposed project in the first year with general descriptions and rationales for the anticipated expenses. You do not need to provide a detailed breakdown of expenses in this financial narrative. Do include:

- (1) Descriptions of the proposed staff assigned to the project and their annual salaries and fringe, and
- (2) Descriptions of the anticipated OTPS project costs. Allowable costs could include:

- i. Contractual Services: Costs related to subject-matter experts or consultants employed at other nonprofit or for-profit entities; subcontracting with other nonprofit providers for a particular area.
- ii. Travel: Travel expenses associated with stakeholder engagement, coordination meetings, launch and testing phase, and activities supporting system development and statewide adoption.
- iii. Equipment: Hardware or software purchases and/or licenses.
- iv. Space, Property, and Utilities: Costs related to physical spaces.
- v. Operating: Overhead expenses including indirect cost rates at a government-approved rate or 15% de minimis.
- vi. Other: Activities supporting system design, testing and implementation, and adoption, including needs assessments or landscape analyses of existing systems and data sources; stakeholder engagement activities such as surveys, interviews, or convenings to inform system development and taxonomy; user testing and feedback collection; and resources to support participation of legal services providers in testing and implementation activities.

For additional allowable expenses and guidance on the above budget categories, see pages 11-12.

- b. Revenue:** Describe any plans to supplement future funding for this project with non-IOLA revenues.

4. Work Plan Narrative (up to 5 pages)

Describe the project's expected timeline, milestones, and goals to plan, build, implement, and scale a Statewide Knowledge Platform.

Information in the narrative may include the following (not an exhaustive list):

- Staff hiring;
- Develop system design and architecture, policies, and procedures;
- Develop core functionality;
- Establish data standards and integration process, including data governance;
- Initial data integration efforts;
- Launch and testing details for stakeholder engagement, participant onboarding, geographic scope, training, and user testing;
- Improvements of system performance, including broader statewide adoption and strengthening coordination across legal service providers;
- Evaluation of system effectiveness;
- Expansion of system to new organizations and/or regions, including ongoing stakeholder engagement; and

- Anticipated needs of the system and users for long-term sustainability, including governance structures, continuity of services beyond the grant period and potential enhancements or expansions.

Applicants should not edit the “Work Plan Properties” or “Work Plan Details” pages in SFS. All Work Plan information should be included in the Work Plan Narrative.

Budget Information & Instructions

Grant Budget

IOLA expects to award up to \$2.5 million for the one-year initial period plus up to two one-year optional renewals for \$1 million per year. **The grant request entered in SFS should indicate the total amount requested for the initial one-year term of the contract**

The grant request should be entered in the “Lines” chart on the “Event Details” page in the “Your Unit Bid Price” field. This must match the total grant funds requested in the SFS Budget.

If awarded, the Contractor will be required to develop and submit a detailed, line-item budget for the contract term. IOLA will provide further instructions and work with the Contractor to develop this budget after award. All detailed budgets are subject to approval.

SFS Instructions

The budget information entered into SFS should contain line-item information for each category you anticipate costs to be supported by an IOLA grant.

The total amount entered in the SFS Budget must equal the amount entered in the “Your Unit Bid Price” field on the Event Details page in order to submit the bid response.

To access the SFS Budget forms, select the “Period” column link (which appears as “1”) under “Lines” in “Step 2: Enter Line Bid Responses”. This will bring you to a page called “Create Bids” where both the Budget and Workplan can be accessed through their respective links in the “Bid Event Periods” box.

Complete the “Budget Properties” page in SFS, showing only those anticipated costs related to developing a Statewide Knowledge Platform for legal services providers throughout New York State consistent with your Program Narrative and supported by this IOLA grant. Assume a 12-month budget with a November 1, 2026, start date.

Note that SFS budget information is entered into the “Period Budget Summary” chart on the “Budget Properties” pages. The “Period Budget Summary” page contains a series of linked web forms accessed through the “Category Details” icon for each Budget Category where budget details, as defined below, are entered and saved. Add rows as needed by clicking the “+” icon located to the right of the “Total Funds” field.

The “Narrative” text boxes in the SFS Budget webpages do not need to be filled out. Narrative detail should be reflected in the Financial Narrative.

Budget Category Guidance

Personal Services:

- **Salary:** Include the Position Title, Annualized Salary Per Position, Standard Work Week (Hours), % of Effort Funded, # of Months Funded, and Total Funds for each position to be supported with this grant.
- **Fringe:** Enter only the total fringe amount to be supported by this grant in the Type/Description and Total Funds fields. Fringe costs need not be calculated for each individual position.

Non-Personal Services:

- **Contractual Services:** Enter the Type/Description and Total Funds for each expense expected in the Contractual Services category. This may include costs related to subject-matter experts or consultants employed at other nonprofit or for-profit entities, or subcontracting with other nonprofit providers for a particular area.

Applicants with proposed subcontracts should pay special attention to the State of New York Contract for Grants §III.B. If awarded, all subcontracts in excess of \$100,000 must include the provisions required by NYS State of New York Contract for Grants §IV.B.(4) and be submitted to IOLA for review and approval prior to execution and a final executed copy of the subcontract must be filed with IOLA.

If the application is approved, subcontractors will be required to submit a Vendor Responsibility Questionnaire and proof of Worker’s Compensation and Disability Insurance coverage to IOLA before a contract can be submitted for execution. Note that submitting a Vendor Responsibility Questionnaire requires the sub-contractor to have/obtain a NYS Vendor ID.

- **Travel:** Enter the Type/Description and Total Funds for each expense expected in the Travel category. This may include travel expenses associated with stakeholder engagement, coordination meetings, pilot implementation, and activities supporting system development and statewide adoption.
- **Equipment:** Enter the Type/Description and Total Funds for each expense expected in the Equipment category. This may include equipment that will be purchased or rented with IOLA requested grant funds. Exclude any service contracts to maintain equipment (e.g., maintenance contracts for copiers, telephone systems, etc.). Equipment service contracts should be included in “Operating Expenses.”

- Space, Property, and Utilities: Enter the Type/Description and Total Funds for each expense expected in the Space, Property, and Utilities categories. This may include costs related to physical spaces, such as rent, mortgage, and utilities such as telephone and internet.
- Operating Expenses: Enter the Type/Description and Total Funds for each expense expected in the Operating Expenses category. This may include general operating expenses and any service contracts to maintain equipment to be supported by an IOLA grant, reasonably broken down into sub-categories (e.g., that may mirror your internal budgeting). IOLA Funds may be applied towards administrative expenses, which may be allocated according to government-approved indirect cost rates (ICR). Where an applicant does not have a government-approved ICR, a 15% *de minimis* ICR rate is allowable. Indirect Cost Rates (ICR) should be categorized as Operating Expenses. If awarded, updated proof of government-approved ICR may be requested by the IOLA periodically throughout the grant term.
- Other: Enter the Type/Description and Total Funds for each expense expected in the Other category. This may include activities stakeholder engagement activities such as surveys, interviews, or convenings to inform system development and taxonomy; user testing and feedback collection; and resources to support participation of legal services providers in pilot and implementation activities.

Required Documents

1. Resumes of staff who will work on this project.
2. Any MOUs, subcontracts, or other agreements that support collaborations described in the Statewide Knowledge Platform Description.
3. Any existing policies or procedures related to data governance, system security, privacy, interoperability standards, or project management practices relevant to the proposed project.
4. Documentation of Current Professional Liability Coverage. Do not upload your entire policy.
5. Sexual Harassment Prevention Certification. As of January 1, 2019, the NYS Office of the State Comptroller (OSC) requires that all applicants provide a certification affirming compliance with the Bureau of Contract's [Contract Advisory #26](#). Applications that do not contain a certification may not be considered for award. Applicants are strongly encouraged to use the OSC approved form (EO 177), although alternative certifications in compliance with the [New York State Guide to Financial Operations XI.18.I](#) will be accepted.

ALL FILES MUST BE UPLOADED IN PDF FILE FORMAT.

REVIEW, AWARD, AND REPORTING PROCESSES

Application Evaluation

Application will be evaluated as indicated below.

Project Evaluation (80 points)

- Organizational Capacity & Experience (15 pts)
- Statewide Knowledge Platform Description (50 pts)
- Work Plan (15 pts)

Financial Evaluation (20 points)

- Financial Narrative (10 pts)
- Project Budgeting (10 pts)

Total Available 100 Points

Award Notification

Successful and unsuccessful applicants will be notified via email to the contact indicated in the “Bidder Contact Information” fields.

Debriefing Opportunity

A debriefing is available to any unsuccessful applicant, which should be requested in writing to IOLAGrants@iola.org within 15 calendar days of the public announcement of the grant award on the IOLA Fund website. 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.

Reporting Obligations and Payment Schedule

The successful applicant will be required to submit progress reports, reimbursement vouchers, and other reports or information as required by IOLA, which may include attending regular meetings to discuss progress. The successful applicant will be expected to report on system development and implementation, including participating organizations, system usage and referral metrics, geographic reach, data integration efforts, and system enhancements, along with narrative updates on launch and testing, stakeholder engagement, and progress toward statewide adoption.

Contract payments will be made monthly after receipt and approval by IOLA of reimbursement vouchers (with supporting expense documentation, if requested). The contract may be eligible for a 25% Advance Payment. Awards are subject to available IOLA funding, the State of New York Contract for Grants, and the IOLA Fund's appropriation under the NYS Budget.

All reports and vouchers, including any supporting expense documentation, may become subject to the Office of the State Comptroller or SFS procedures.

NEW YORK STATE CONTRACT REQUIREMENTS

At Time of Grant Application

SFS Registration

Applicants must be registered with the New York Statewide Financial System (SFS) and provide their Identification Number at the time of application. Proper role access will be required to enter and submit an application.

To register and to find additional information:

http://www.osc.state.ny.us/vendor_management/index.htm

SFS Prequalification

Prequalification is a required condition to apply for a grant. Additional information, including online tutorials, can be found on the Grants Management website (<https://grantsmanagement.ny.gov/get-prequalified>). Specific questions about the prequalification process can be directed to IOLA staff (IOLAGrants@iola.org) or the SFS Helpdesk at Helpdesk@sfs.ny.gov or 855-233-8363.

Applicants are strongly urged to become familiar with the Grants Management functionality in SFS. Please visit the [Vendor SFS Transition Page](#) to access training videos, PowerPoint Presentations, and other system instructions.

After the Grant Award

NYS Attorney General's Charities Bureau Registration

IOLA grantees must be registered with the Attorney General's Office as a charitable organization by the time of contracting. To determine the status of your Charities Bureau registration and to find additional information: http://www.charitiesnys.com/charities_new.jsp.

IOLA grantees are required to keep their registration up to date at all times throughout the term of the contract. Failure to keep “current” with the Charities Bureau may result in withheld payment, rescission, or termination of the contract.

NYS Comptroller’s Vendor Responsibility Questionnaire

New York State Finance Law requires that state agencies award contracts to responsible vendors, including not-for-profit corporations, which is determined based on information provided by the vendor through the NYS VendRep System. All Vendor Responsibility Questionnaires must be dated within six months of the contract execution date and the determination that an applicant is a responsible vendor is a condition to final execution of a grant contract with IOLA. To enroll or to update an existing Questionnaire in the VendRep System:

<http://www.osc.state.ny.us/vendrep/index.htm>

IOLA grantees are required to re-certify the Vendor Responsibility Questionnaire at least every six months and upon IOLA’S request throughout the term of the contract.

Insurance Documentation

In connection with contract execution, IOLA grantees will be required to submit proof of current insurance coverage for the following (ACORD forms are not acceptable):

- Workers’ Compensation (Form C 105.2), and
- Disability (Form DB 120.1)

IOLA may request proof of current insurance coverage for Workers’ Compensation and Disability and Paid Family Leave benefits throughout the term of the contract.