



IOLA Fund of the State of New York Comprehensive & Dynamic Legal Services Directory

Application Process Questions & Answers (as of July 23, 2026)

Question 1: While the RFP does not permit supplemental materials beyond those outlined, can applicants incorporate images, graphics, or diagrams within the narrative response, provided the overall narrative stays within the page limits?

Answer: Yes. Applicants may incorporate images, graphics, or diagrams within the response, provided the overall narrative stays within the page limits.

Question 2: Does IOLA expect roughly proportional allocation of the 20-page limit for section 2, “Description of Proposed Comprehensive & Dynamic Legal Services Directory,” across all four required sub-sections combined? And will the 50 points for this section be evenly allocated across each sub-section?

Answer: No. IOLA does not necessarily expect roughly proportional allocations of page limits for any narrative sections or subsections, including the Description of Proposed Comprehensive & Dynamic Legal Services Directory’s 4 sub-sections.

The 50 points for this section will not necessarily be evenly allocated across each sub-section.

Question 3: Should the Work Plan and technical vision be scoped primarily to the 12-month initial term, or should applicants present a 24-month vision as the default planning horizon?

Answer: The application should be scoped to the 12-month initial period.

Question 4: What level of operability is expected at the end of Year 1?

Answer: IOLA does not have specific expectations regarding the level of operability expected at the end of Year 1.

Applicants should describe their proposed project timeline, milestones, and goals to plan, build, implement, and scale a comprehensive and dynamic directory of legal services resources and available assistance in the Work Plan narrative.

Question 5: What are IOLA's expectations for how "real-time" the directory data should be, and will these expectations change from Year 1 to Year 2? Will IOLA require its grantees to participate in the directory and keep their status current?

Answer: IOLA envisions the comprehensive and dynamic directory will include infrastructure for real-time information that may enable coordinated intake and effective referrals, as well as create opportunities for integration with other infrastructure investments that can improve diagnosis of legal problems and the delivery of legal information.

IOLA does not have specific expectations regarding the real-time capabilities of the directory at the end of Year 1 or Year 2. Applicants should describe their proposed project timeline, milestones, and goals to plan, build, implement, and scale a comprehensive and dynamic

directory of legal services resources and available assistance in the Work Plan narrative.

IOLA reserves the right to require grantee participation in the comprehensive and dynamic directory. However, IOLA anticipates the awarded grantee will coordinate with organizations leading other Justice Infrastructure Project initiatives and the legal services community to ensure maximum participation in the comprehensive and dynamic directory. IOLA expects to assist with this coordination.

Applicants should describe their proposed strategy for engaging legal services providers, community-based organizations, and other stakeholders in Description of Proposed Comprehensive & Dynamic Legal Services Directory.

Question 6: Can you clarify whether the Directory RFP anticipates that screening, intake, and/or referral capabilities will be built, tested, and deployed by the end of Year 1? The “About this Grant Opportunity” section suggests they might, while the “Scope of Services” section appears narrower. How should applicants interpret the expected scope and timing of these features?

Answer: IOLA does not have specific expectations regarding the screening, intake, and/or referral capabilities to be built, tested, and deployed at the end of Year 1, however, IOLA anticipates the Comprehensive and Dynamic Directory will be designed with these capabilities in mind. Applicants should describe their proposed project timeline, milestones, and goals to plan, build, implement, and scale a comprehensive and dynamic directory of legal services resources and available assistance in the Work Plan narrative.

Question 7: Is there an existing inventory landscape of New York legal services directories and referral systems (LawHelpNY, 211, court self-help services, etc.) that applicants should integrate with by name, or is that

landscape analysis and prioritization part of the funded scope, since it is referenced as an allowable “Operating” expense?

Answer: A landscape analysis of New York legal services directories and referral systems and prioritization is part of the funded scope of this project that can be budgeted as an allowable expense.

Over the course of the Justice Infrastructure Project, IOLA has collected preliminary information that may be relevant to a landscape analysis of New York legal services directories and referral systems. IOLA will share any knowledge pertaining to legal services directories and referral systems with the awarded grantee.

If awarded, the grantee will work with IOLA’s Program Team to finalize the contract’s budget. During this time, specific expenses may be discussed and negotiated.

Question 8: How will the selected grantee be evaluated at the end of Year 1? From IOLA’s perspective, what are the minimum functional deliverables and success metrics an awardee must meet by the end of Year 1 to be considered successful and eligible for renewal?

Answer: Applicants should describe their proposed success metrics for evaluating launch success and readiness for expansion of the comprehensive and dynamic directory in the Description of Proposed Comprehensive & Dynamic Legal Services Directory narrative.

Applicants should describe their proposed project timeline, milestones, and goals to plan, build, implement, and scale a comprehensive and dynamic directory of legal services resources and available assistance in the Work Plan narrative.

Question 9: Please clarify IOLA's intended governance model for the project build phase. Because the Directory RFP requests proposed approaches to governance while a separate Justice Infrastructure Project Governance

RFP is being procured, it is unclear where authority for certain prioritization, policy development, and other strategic decisions will reside that impact the Directory features, scope, and budget.

Answer: IOLA anticipates that each individual Justice Infrastructure Project initiative will manage and oversee its individual development, sustainability, and maintenance. Applicants should describe their proposed approach to internal project governance, including project management, prioritization, oversight, and decision-making mechanisms, in Description of Proposed Comprehensive & Dynamic Legal Services Directory narrative.

IOLA envisions the Comprehensive & Dynamic Directory will collaborate with other stakeholders, including legal services providers and community-based organizations, throughout the design, implementation, and ongoing use of the system. Applicants should describe their proposed strategy for engaging legal services providers, community-based organizations, and other stakeholders in Description of Proposed Comprehensive & Dynamic Legal Services Directory.

The overarching Justice Infrastructure Project Governance body may coordinate with organizations leading the individual Justice Infrastructure Project initiatives to ensure there is no duplication of effort, overlapping responsibilities, or conflicting lines of accountability. IOLA and its Justice Infrastructure Project Manager anticipate facilitating this coordination through quarterly check-in calls with the leads of all individual Justice Infrastructure Project initiatives.

Question 10: Can you clarify IOLA's expectations on long-term directory data and system ownership, since the RFP asks applicants to describe their sustainability plans but also says "future investment decisions may be made in a separate RFP process." Is IOLA expecting the grantee to propose a long-term sustainability and business plan in its response, or is that out of scope for this RFP?

Answer: IOLA does not anticipate retaining rights to the long-term directory data and system. The nature of the long-term use and ownership of the build has yet to be determined and will be informed by continued Justice Infrastructure Project developments including responses to the Sustainability & Maintenance narrative subsection of the RFP and the creation of a Governance body to inform the management and ownership of Justice Infrastructure Project initiatives.

Applicants should recommend a long-term sustainability and business plan in their responses to the Sustainability & Maintenance section in the Description of Proposed Statewide Knowledge Platform narrative.

Question 11: Data/IP ownership: if IOLA funds the build, does IOLA retain rights to the codebase/data model for use in a future rebid, or does the grantee retain ownership subject to license?

Answer: IOLA does not anticipate retaining rights to the long-term directory data and system. The nature of the long-term use and ownership of the build has yet to be determined and will be informed by continued Justice Infrastructure Project developments including responses to the Sustainability & Maintenance narrative subsection of the RFP and the creation of a Governance body to inform the management and ownership of Justice Infrastructure Project initiatives.

Applicants should recommend a long-term sustainability and business plan in their response to the Sustainability & Maintenance section in the Description of Proposed Statewide Knowledge Platform narrative.

Question 12: Are there any required technology constraints, hosting environment, state security/compliance requirements (e.g., NYS ITS policies), accessibility standards, that the technical approach must comply with?

Answer: If awarded, the grantee must be in compliance with the NYS Contract for Grants provisions, including §III.F (confidentiality) and §III.H (accessibility of web-based applications). All NYS Grant contracts are

subject to Appendix A – Standard Clauses for New York State Contracts.

Question 13: There is significant overlap between aspects of the Comprehensive Directory and the Statewide Knowledge Platform, and interoperability goals. If an organization is prime on one grant and a partner on the other, how should shared staff effort be allocated across the two awards?

Answer: If an organization serves as the prime contractor on one award and as a partner on another, they should not double-charge Justice Infrastructure Project expenses to IOLA.

If awarded, the grantee will work with IOLA's Program Team to finalize their contract's work plan and budget. During this time, the appropriate placement of program work and individual budget items can be discussed and negotiated.

Question 14: Is it possible that an application can be successful but the grant award can be less than the "ask"? Or does IOLA simply say 'Yes' or 'No' to our request?

Answer: Yes. The IOLA Fund plans to award one Simplified Renewal Agreement which includes a one-year initial period for up to \$1,250,000. The IOLA Fund's Board of Trustees considers a number of factors in setting award amounts.

Question 15: An applicant is a 100% volunteer nonprofit organization that does not have payroll. They have inquired to their insurance carrier for General Liability, and they do not provide Professional Insurance to nonprofits, only a "Business Owners Policy." They are applying for the grant as they have a division of volunteer attorneys and paralegals. They have a General Liability policy as well as E&O (Errors and Omissions) Insurance. Will this suffice? Or would a Business Owners Policy (if different than General Liability), suffice?

Answer: Applicants must submit documentation of their current professional liability insurance (e.g. malpractice coverage) as part of their application per IOLA's regulations under 21 NYCRR § 7000.15(c). General Liability Insurance, Directors and Officers Policy, or Business Owners Policy is not the equivalent of professional liability coverage.