

IOLA Fund of the State of New York

Project Management Consultant Services RFP

Application Process Questions & Answers (as of June 24, 2026)

Corrections to the RFP Document

Question 1: The award criteria in the RFP appears to total 110 points, but the RFP also states that total points available are 100. Can IOLA clarify whether the award criteria total is 100 or 110 points?

Answer: The correct award criteria total is 100 points as detailed below:

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

Question 2: The “Contract Term – Periods of Performance” table in the Cost Proposal section repeats 10/01/2027–09/30/2028 for Renewal Options Two through Four. Should these dates match the dates listed in Section 3: Renewal Option Two = 10/01/2028–09/30/2029, Renewal Option Three = 10/01/2029–09/30/2030, Renewal Option Four = 10/01/2030–09/30/2031?

Answer: The correct “Contract Term – Periods of Performance”

table should match the dates in Section 3, displayed below:

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

Question 3: The RFP recommends that applicants limit proposals to “twenty (25) pages,” excluding resumes and forms. Please confirm whether the recommended page limit is 20 pages or 25 pages.

Answer: The correct recommended page limit is 20 pages, excluding resumes and forms.

Minimum Eligibility

Question 4: For the Minimum Eligibility requirement that the applicant be licensed and authorized to do business in New York State, is the signed Minimum Eligibility Form sufficient, or should applicants include supporting documentation? If supporting documentation is required, please clarify what form of proof is acceptable.

Answer: Applicants do not need to include supporting documentation to prove they are licensed and authorized to do business in New York State; the affirmation on the Minimum Eligibility Form is sufficient.

Question 5: Should applicants include evidence of Vendor Responsibility Questionnaire certification with the proposal, or is affirmation on the Minimum Eligibility Form sufficient?

Answer: Applicants do not need to include evidence of the Vendor Responsibility Questionnaire certification with the proposal; the affirmation on the Minimum Eligibility Form is sufficient.

By law, State contracting entities may only award contracts to responsible vendors. If selected for award, IOLA will conduct a thorough review of the applicant's Vendor Responsibility Questionnaire to make a responsibility determination.

Question 6: For the Minimum Eligibility requirement stating that the applicant must hold Workers' Compensation and Disability Insurance, will IOLA accept a current NYS Workers' Compensation Board CE-200 Certificate of Attestation of Exemption in lieu of workers' compensation and disability benefits insurance certificates, where the proposer is legally exempt because it has no employees?

Answer: New York State Workers' Compensation Law (WCL) has specific coverage requirements for businesses contracting with New York State. IOLA will accept all proof of Worker' Compensation Coverage outlined in the New York State Comptroller's [Guide to Financial Operations XI.18.G](#). Acceptable documentation includes:

- Form C-105.2 – Certificate of Workers' Compensation Insurance issued by private insurance carriers, or Form U-26.3 issued by the State Insurance Fund; or
- Form SI-124 – Certificate of Workers' Compensation Self-Insurance; or Form GSI-105.25 Certificate of Participation in Workers' Compensation Group Self-Insurance; or
- CE-2006 – Certificate of Attestation of Exemption from NYS Workers' Compensation and/or Disability Benefits Coverage.

Question 7: Should proof of Workers' Compensation and Disability Benefits insurance forms be submitted with the proposal, or only upon award/contract execution?

Answer: Proof of Workers' Compensation and Disability Benefits insurance forms does not need to be submitted with the proposal. For application purposes, the affirmation on the Minimum Eligibility Form is sufficient.

Workers' Compensation and Disability Benefits insurance forms will be required upon award for contracting purposes.

Question 8: Can a proposal include a team structure in which the prime applicant satisfies the minimum eligibility requirements and provides the civil legal aid and access-to-justice expertise, while a subcontracted partner supports governance coordination, stakeholder meeting design and synthesis, implementation roadmapping, decision documentation, and knowledge transfer infrastructure?

If this structure is allowable, should the subcontracted partner's qualifications, role, and level of effort be included, as applicable, in the Organizational Capacity, Project Workplan, Relevant Expertise, and Service Quality sections?

Answer: Applicants may include subcontracting structures as part of their application. The subcontractor's qualifications, role, and level of effort should be included in the Organizational Capacity, Project Workplan, Relevant Expertise, and Service Quality sections.

Subcontractors receiving less than \$100,000 from this award do not need to meet the Minimum Eligibility requirements.

Subcontractors receiving an excess of \$100,000 from this award will need to meet the Minimum Eligibility requirements. If awarded, these 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.

Question 9: Can you please advise if the incumbent organizations that have participated in the Justice Infrastructure Project to date will be precluded from bidding on this RFP?

Answer: The incumbent organizations that have participated in the Justice Infrastructure Project to date will not be excluded from bidding on this RFP.

Formatting, Page Counts, and Forms

Question 10: Should the proposal be one consolidated PDF or separate PDFs by section?

Answer: The proposal should be consolidated into one PDF.

Question 11: Should the Cost Proposal be submitted as a separate PDF or as part of the same PDF in the required tab order?

Answer: The Cost Proposal section should be included as part of the same PDF in the required order.

Question 12: Does 25-page recommended limit include cost, cover pages, TOC, addenda, terms comments, and

supplemental info?

Answer: The recommended 20 page limit (see Question 3) does not include the Cost Proposal section, Table of Contents, Addenda, Comments Regarding Terms and Conditions of Form of Contract, and Supplemental Information.

Question 13: Are Section 2 page counts hard maximums or recommendations?

Answer: The page counts for Section 2 are recommendations, not hard maximums. For review purposes, IOLA would prefer applicants to follow the recommended page counts.

Question 14: Is the Minimum Eligibility Form the only required form with the proposal?

Answer: The Minimum Eligibility form and the Table of Contents form are both required in your proposal.

Question 15: Are electronic signatures acceptable for the proposal and Minimum Eligibility Form?

Answer: Electronic signatures are acceptable for the Minimum Eligibility Form. No additional signatures are needed in your application.

Question 16: The RFP indicates that proposals must be signed by an authorized representative of the proposing organization. Can you please confirm whether the signature included on the Minimum Eligibility Form satisfies this requirement, or if a separate signed authorization/signature page should also be included as part of the proposal submission?

Answer: The signature on the Minimum Eligibility form satisfies this

requirement; no additional signatures are needed in your application.

Question 17: Where is Form of Contract available, and is a specific exceptions format required?

Answer: All New York State agencies are subject to [Appendix A: Standard Clauses for New York State Contracts](#). Specific contract terms related to the scope of work will be negotiated upon award. Any and all contracts created as a result of this RFP shall be subject to the terms set forth in the RFP (see p. 5-11).

Section Questions

Question 18: Can IOLA provide any guidance regarding what should be included in the Introductory Statement? (The RFP only mentions it in the Table of Contents.)

Answer: The Introductory Statement should be a brief introduction to your business and application. IOLA recommends the Introductory Statement not exceed one page.

Question 19: Are there any Addenda that we are required to acknowledge? (There is no reference to any in the RFP and it is written as “Acknowledgement of Addenda, if applicable.”)

Answer: There is no Addenda applicants are required to acknowledge.

Question 20: Would IOLA consider including experience with other states beyond New York to open up the procurement to firms with deep experience with Project Management Consulting Services in the area of public safety and

justice?

Answer: Applicants with relevant experience with other states in the area of public safety and justice are welcome to apply to this RFP. However, IOLA has a strong interest in working with a vendor who has experience in New York State.

Question 21: Will comparable large-scale public sector program management experience be considered in lieu of direct civil legal aid experience?

Answer: Applicants with comparable large-scale public sector program management experience are welcome to apply to this RFP. However, IOLA has a strong interest in working with a vendor who has civil legal aid experience.

Expectations of the Applicant

Question 22: Can you please confirm if there are any MBE, WBE, or SDVOB Utilization Goals for the prime vendor to satisfy for this contract?

Answer: There will be no MBE, WBE, or SDVOB Utilization Goals for this contract.

Question 23: What level of in-person meeting, conference, workshop, or stakeholder engagement travel is anticipated during the contract term? Also, can you please share the possible locations of travel?

Answer: IOLA anticipates that the Project Manager will travel to in-person events throughout New York State as needed throughout the contract term. Travel may be expected for summits, conferences, convenings, or other in-person opportunities. In the first year of the contract, travel is

currently expected to Albany and New York City.

Question 24: Please identify which Justice Infrastructure Project initiatives are currently active and expected to require Project Manager support at contract commencement.

Answer: IOLA currently has two active Justice Infrastructure Project initiatives: a [Statewide Training Center for Civil Legal Services](#) and the Cybersecurity and Technical Assistance Project (CyTAP). In FY27, IOLA anticipates launching the following additional initiatives: Comprehensive & Dynamic Legal Services Directory, Statewide Knowledge Platform, and Justice Infrastructure Project Governance. The Project Manager will be expected to participate in the management of these initiatives. This may involve attending quarterly check-in calls and conducting any other needed coordination to ensure all initiatives are aligned with the objectives of the Justice Infrastructure Project.

The Project Manager will also be expected to assist with any Justice Infrastructure Project related trainings and convenings.

Question 25: What project management, governance, and implementation artifacts currently exist, and will these be provided to the selected contractor?

Answer: Existing Justice Infrastructure Project documentation include consulting group recommendations, Board reports, publicly available reports posted to IOLA's website at <https://www.iola.org/about-iola/justice-infrastructure-project>, and other internal documentation. All relevant documents will be provided to the selected contractor.

Question 26: What level of engagement is anticipated with state agencies, courts, and other governmental partners during the initial contract period?

Answer: IOLA does not have any engagement currently planned with state agencies, courts, or other government partners for the initial contract period. However, the Justice Infrastructure Project envisions engagement from a broad array of stakeholders. The Project Manager may be expected to coordinate and meet with government partners as needed as the Justice Infrastructure Project continues to develop.

Question 27: Have advisory committees, consulting groups, governance bodies, or successor stakeholder structures been established as part of JIP, and what support responsibilities will the selected Project Management Consultant have for those groups?

Answer: IOLA has conducted two rounds of consulting group discussions, each producing recommendations presented to IOLA's Board regarding the direction of the Justice Infrastructure Project. These consulting groups have concluded their work and IOLA does not currently anticipate any additional committees, consulting groups, or other stakeholder structures during the initial contracting period.

IOLA does anticipate launching a Justice Infrastructure Project Governance initiative. The Project Manager will be expected to participate in the management of this initiative. This may involve attending quarterly check-in calls and conducting any other needed coordination to ensure all initiatives are aligned with the objectives of the Justice Infrastructure Project.

Question 28: Are additional procurements or vendor engagements anticipated for this term? If yes, what role will the selected

Project Management Consultant have in supporting those activities?

Answer: IOLA currently has two active Justice Infrastructure Project initiatives: a [Statewide Training Center for Civil Legal Services](#) and the Cybersecurity and Technical Assistance Project (CyTAP). In FY27, IOLA anticipates launching the following additional initiatives: Comprehensive & Dynamic Legal Services Directory, Statewide Knowledge Platform, and Justice Infrastructure Project Governance. The Project Manager will be expected to participate in the management of these initiatives. This may involve attending quarterly check-in calls and conducting any other needed coordination to ensure all initiatives are aligned with the objectives of the Justice Infrastructure Project.

The Project Manager will also be expected to assist with any Justice Infrastructure Project related trainings and convenings.

Question 29: Please clarify the expected frequency, audience, and format of Board reporting, executive reporting, and stakeholder reporting deliverables.

Answer: IOLA's Board meets on a quarterly basis and receives a report on the Justice Infrastructure Project at each meeting. The Project Manager may be expected to assist with the preparation of this report and related documents. Formal presentations by the Project Manager to IOLA's Board may occur as needed on a less frequent basis.

Question 30: How often should contractor prepare/present Board materials?

Answer: IOLA's Board meets on a quarterly basis and receives a report on the Justice Infrastructure Project at each meeting. The Project Manager may be expected to assist

with the preparation of this report and related documents. Formal presentations by the Project Manager to IOLA's Board may occur as needed on a less frequent basis.

Question 31: Does IOLA expect monthly meetings plus quarterly reporting, or only quarterly formal reports?

Answer: IOLA staff anticipate meeting on a regular basis with the Project Manager as determined by the developments and needs of the Justice Infrastructure Project. Formal, written reports are required as needed and, to date, have been infrequent.

Question 32: What project management, collaboration, document management, and reporting tools are currently being used to support JIP activities, and will the selected contractor be expected to use existing tools or provide its own platform and processes?

Answer: The selected contractor will not be expected to use any existing tools. Use of any project management, collaboration, document management, and reporting tools, platforms or processes is at the discretion of the selected contractor.

Question 33: What is the estimated annual level of effort or budget range?

The total project budget will be determined by the responses submitted for this RFP.

Question 34: How many vendors and stakeholders will require coordination?

Answer: IOLA currently has two active Justice Infrastructure Project initiatives: a [Statewide Training Center for Civil](#)

[Legal Services](#) and the Cybersecurity and Technical Assistance Project (CyTAP). In FY27, IOLA anticipates launching the following additional initiatives: Comprehensive & Dynamic Legal Services Directory, Statewide Knowledge Platform, and Justice Infrastructure Project Governance. The Project Manager will be expected to participate in the management of these initiatives. This may involve attending quarterly check-in calls and conducting any other needed coordination to ensure all initiatives are aligned with the objectives of the Justice Infrastructure Project.

The Project Manager will also be expected to assist with any Justice Infrastructure Project related trainings and convenings.

Such trainings and convenings would target IOLA's grantees, which currently include 87 non-profit legal services organizations.

Question 35: What are the travel expectations for Year 1?

Answer: IOLA anticipates that the Project Manager will travel to in-person events throughout New York State as needed throughout the contract term. Travel may be expected for summits, conferences, convenings, or other in-person opportunities. In the first year of the contract, travel is currently expected to Albany and New York City.

Question 36: Can IOLA provide current Phase 3 artifacts and implementation status?

Answer: Yes. If awarded, IOLA will provide all current Justice Infrastructure Project documents and implementation status updates. Previous public updates, research, and presentations are available on IOLA's website at <https://www.iola.org/about-iola/justice-infrastructure-project>.