

THE BRONX DEFENDERS

Request for Proposals (RFP)

Contract Lifecycle Management (CLM) Software

Issued By: The Bronx Defenders

RFP Issue Date: May 1, 2026

Proposal Due Date: June 19, 2026

1. Introduction

Founded in 1997, The Bronx Defenders (BxD) is a public defender nonprofit that has developed a nationally recognized model of representation called holistic defense, which provides people with teams of lawyers, social workers, and advocates to defend them zealously in court as well as to address the underlying drivers and enmeshed penalties of legal system involvement.

Since opening our doors, we have grown into an organization of more than 400 staff members defending nearly 20,000 New Yorkers each year in criminal, family, civil, and immigration proceedings who face incarceration, family separation, eviction, and deportation, among other devastating consequences.

Today we are reimagining the role of public defense even further, using community organizing and engagement, legislative advocacy, and impact litigation to partner with the communities we represent to bring about long-lasting systemic change.

We also share our model and lessons learned with current and future public defenders. We run two legal clinics at NYC law schools and train public defenders throughout the country to the next on how to move to a holistic model of representation.

2. Project Background and Overview

The purpose of this Request for Proposals is to invite vendors to participate in The Bronx Defenders' procurement process for acquiring a Contract Lifecycle Management (CLM) Software. The goal is to solicit proposals for products and services that address The Bronx Defenders' needs.

BxD's preference is for a Software as a Service (SaaS) solution that supports integration with BxD's Azure Active Directory Identity-single sign on technology already set in place.

3. Functional Requirements

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The Bronx Defenders currently stores contracts in various electronic and physical locations. BxD wishes to update its contract lifecycle management tools and procedures in order to provide greater efficiency, tracking, and visibility. As such, the new contract lifecycle management system should provide the following:

- The creation, modification, secure storage, and electronic workflow routing of contracts.
- Tracking important dates and automatically calendaring for internal stakeholders.
- Support an automated process by which BxD's Finance department must receive internal stakeholder approval to process invoices.
- Ability to create and tailor a review and approval flow, and support coordination to do so among different BxD stakeholders.
- Have automated blocks or notifications when a contract is past its term or when an invoice is over an approved threshold.
- Integrate with SharePoint, and Stampli (accounts payable) or Sage Intacct (accounting). The solution must be capable of integration with other systems should BxD partner with new vendors.
- Maintain an approved template library.
- Electronic signing with both DocuSign and Adobe Acrobat sign.
- Keep "parent" and "child" contracts together. Examples include contract renewals, Master Service Agreements or Scopes of Work.
- Automatically store documents in SharePoint.
- Track customizable fields, including, but not limited to:
 - Start date, end date, renewal date.
 - Internal Owner of Contract.
 - Counterparty name.
 - Counterparty contact info for notices.
 - Type of contract.
 - Cost per month/year/other.
 - Whether the contract is an initial or a renewal.
 - IP, termination, and other important provisions.
 - Free text field for any notes.
 - Funders.
- Provide a capability to load BxD's contracts and tag custom fields, including but not limited to the above.

Each RFP should provide answers to the questionnaire below.

1. Company Overview

- How long have you been in business?

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- Who are your key clients in the legal, nonprofit, or government sector?
- Do you subcontract any services? If yes, who are they?

2. Product/Service Information

- Provide a high-level overview of your platform/product.
- What core functions does your system provide (e.g., case management, collaboration, document management)?
- Roadmap: What major features or changes are planned in the next 12–18 months?

3. AI Capabilities

- Does the product include AI/ML features?
- If yes, please fill out this [form](#).

4. Security & Compliance

- Do you have current certifications (SOC 2 Type II, ISO 27001, HIPAA, GDPR, CJIS, etc.)?
- How is data encrypted (in transit / at rest)?
- Do you support role-based access controls (RBAC), SSO, and MFA?
- Provide details of your data breach notification process.

5. Data Management

- Where is customer data stored (geographic region / data centers)?
- What is your data retention and deletion policy?
- Do you support data export in open formats (for exit/migration)?
- How do you segregate customer data in multi-tenant environments?

6. Legal & Contractual

- Will you sign a Data Processing Agreement (DPA) and/or Business Associate Agreement (BAA)?
- Will you agree to an NDA covering technical and compliance documentation?
- Provide a sample SLA (Service Level Agreement).

7. Operational Fit

- What onboarding and training support do you provide?
- Do you offer a dedicated account manager or support team?
- What is your average support response time (critical vs. non-critical)?

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8. Financial Stability

- Provide a statement of financial health (or confirmation of profitability/funding).
- Do you have a contingency plan if your company is acquired, sold, or discontinues the product?

9. Risk Management & Audits

- Have you undergone recent third-party security audits or penetration tests?
- Do you provide audit logs of all user/system activity?
- What is your disaster recovery and business continuity plan?

10. Pricing & Licensing

- Provide an overview of licensing model (per user, per seat, enterprise, nonprofit discounts).
- List all additional fees (storage, training, AI features, integrations).
- Provide a sample contract for review.

4. Proposal Requirements

Proposals should include the following information.

- a) Executive Summary.
 - a. Overview of the CLM and its capabilities.
 - b. Summary of the proposed approach and key differentiators.
- b) Company Profile and Questionnaire Responses.
- c) Proposed Solution.
 - a. Detailed description of the proposed services.
- d) Implementation Plan.
 - a. Timeline.
 - b. Phases.
 - c. Team structure and roles.
 - d. Migration/Ingestion approach.
 - e. Estimated effort from BxD for successful implementation.
 - f. Key milestones, deliverables, and dependencies.
- e) Training and Support Services.
- f) Pricing Structure.
 - a. Setup.

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- b. Licensing.
- c. Support.
- d. Miscellaneous Costs.
- e. Optional services and pricing models.
- g) Client References, preferably from other nonprofit organizations.
 - a. Contact information for at least three current or former clients with similar requirements.

5. Evaluation Criteria

Relevant Experience and Expertise	25%
Ability to meet functional requirements	35%
Pricing and Cost Competitiveness	20%
References and Past Performance	10%
Implementation Plan Effectiveness	10%

6. RFP Timeline

RFP Issued	5/1/2026
Deadline for Questions	5/29/2026
Proposal Submission Deadline	6/19/2026
Finalist Interviews	7/20/2026-7/24/2026
Vendor Selection and Notification	7/31/2026
Project Start Date	8/10/2026

7. RFP Submission Instructions

Submission Deadline: 6/19/2026

Submission Method: Email proposals to alane@bronxdefenders.org with the subject line: RFP
Response: CLM - [Vendor Name]

Contact for Questions:

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Director of Strategic Operations

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Thank you for your interest in partnering with The Bronx Defenders. We look forward to reviewing your proposal.