REQUEST FOR PROPOSAL
Legal Operations, Technology, and Artificial Intelligence (AI) consultant
Question and Answer
August 5, 2024

1. What is the rough size of each of these groups? OCTC, OGC, Regulation and OA&I?
   - OCTC: approximately 293 staff (including 94 attorneys)
   - OGC: approximately 20 staff (including 15 attorneys)
   - Regulation: approximately 21 staff (including 2 attorneys)
   - OA&I: approximately 26 staff

2. What type of applications is the State Bar of California currently using for productivity, if any? (for example Office 365, etc.)
   - Microsoft (Teams, Sharepoint, Office)

3. Where do you envision the balance of size and scope for the assessment and recommendations for the State Bar versus the legal aid organizations? What is the relative balance of size and scope of the assessments?
   - Proposals should respond to all parts of the RFP, which includes an assessment of and recommendations for both the State Bar and the legal aid organizations.

4. Is there a FedRAMP security requirement or is SOC2/type 2 adequate?
   - This business decision will depend on what type of data is involved, but SOC2 would be generally sufficient. The potential exposure of sensitive data would mean that further consideration would be required to determine whether SOC2 would provide adequate security.

5. Is it appropriate to incorporate document management systems (DMS) or suggestions for document management into the proposal?
   - While not required, that could be relevant.

6. It's hard to predict costs for some of the tools we might propose, as the costs are tied to the amount of data involved (which is unknown). How to handle that?
   - We recommend focusing on the cost of the consultancy (the assessment) first. If your proposal will include hard costs for products, please provide as much information as possible and your best guess. Since the questions about cost is

San Francisco Office
180 Howard Street
San Francisco, CA 94105

www.calbar.ca.gov

Los Angeles Office
845 S. Figueroa Street
Los Angeles, CA 90017

open ended, we may follow up with bidders after all bids have been submitted to ask some specific follow-up questions to equalize costs across proposals.

7. Could the proposal include tools other than AI?
   - Yes, the RFP focuses on legal ops, legal tech, and AI, so this could be appropriate.