

The State Bar of California

REQUEST FOR INFORMATION



This document is a Request for Information (“RFI”) for Change Management Services.

The State Bar of California is seeking to encourage innovative approaches by qualified providers to meet important program objectives. This RFI is non-binding. The State Bar will have no obligations under it and no contract will be awarded based on it. A response to the RFI is optional and not a requirement of any subsequent procurement. Responses may be used to structure a Request for Proposals (“RFP”), which may serve as the basis of a contract. If the State Bar decides to issue an RFP, the RFP will be distributed to all respondents to this RFI and posted on the State Bar Web site.

I. INTRODUCTION

The State Bar of California (“the State Bar”) created in 1927 by the Legislature and adopted into the California Constitution in 1960, is a public corporation within the judicial branch of state government. The primary purpose of the State Bar is to serve as an administrative adjunct to the California Supreme Court in all matters pertaining to the admission, discipline, and regulation of California lawyers. The State Bar Act and California court rules vest in the State Bar the duty to regulate the legal profession, formulate and elevate educational and professional standards, raise the quality of legal services, advance the science of jurisprudence, and aid in the improvement of the administration of justice.

The State Bar is a unified, or integrated bar, and membership is mandatory for all attorneys who are licensed to practice law in the state. In addition to its mandated licensing and disciplinary and certification functions, the State Bar offers a number of other programs designed to assist, educate and protect its members and the public. The State Bar’s programs are financed primarily by fees paid by attorneys and applicants to practice law. The State Bar has over 230,000 members, making it the largest unified state bar in the country. The State Bar has offices located in Los Angeles and San Francisco. For more than 80 years, The State Bar of California has shaped the development of the law, regulated the professional conduct of the state’s lawyers and provided greater access to the justice system for all citizens. More information about the organization can be found at <http://www.calbar.ca.gov/AboutUs.aspx>.

II. BACKGROUND

In January, 2012, the Board of Trustees of the State Bar of California adopted the organization's Five-Year Strategic Plan (2012-16). The strategic plan commits the State Bar to three major initiatives, each of which implies significant change within the organization:

1. **Technology Initiative:** includes the replacement of four line-of-business software applications, implementation of a Bar-wide document management platform, transition to near-paperless processes in the Bar's largest programs, and an expanded public-facing web portal.
2. **Facilities Initiative:** re-configuration of the State Bar's headquarters building in San Francisco, potential acquisition of a new building in southern California (following the 2013 expiration of its office lease in Los Angeles), and the potential relocation of certain programs and functions from Los Angeles to San Francisco.
3. **Operating Process Reengineering Initiative:** systematic re-evaluation of each of the State Bar's major business processes to improve efficiency, timeliness, reliability, and quality of service.

III. OBJECTIVES

The State Bar wishes to engage the services of one or more professional services organizations with significant expertise and experience in change management to assist in the attainment of the following objectives:

1. Successful implementation of the organizational, physical and technological changes outlined in the State Bar's Five-Year Strategic Plan (2012-16), summarized above.
2. Significant and lasting improvement in the State Bar's internal capacity for change management, innovation, and continuous improvement.

IV. AREAS OF EXPERTISE SOUGHT

1. **Organizational Change Management:** identifying challenges and risks to organizational change projects; devising strategies to meet the challenges and mitigate the risks; developing change management plans to implement the strategies; executing change management plans over the course of multi-year organizational change projects.
2. **Internal Communications:** devising internal communication strategies to support organizational change projects; developing and implementing internal communications plans over the course of multi-year organizational change

projects.

3. **Training and Staff Development:** assessing gaps between existing skill-sets and skill-sets required in post-change environments; developing and evaluating training plans to bridge identified gaps; managing training efforts over the course of multi-year organizational change projects.

III. RESPONSE ADMINISTRATION

The submission requirements for this RFI are set forth below.

A. Responses Requested

1. A brief description of the organization's history, qualifications and position in specific current markets.
2. A general description of the techniques, approaches and methods to be used in providing these services.
 - a. Generally applicable challenges and risks to be addressed
 - b. Generally applicable change management plan elements
 - c. Approach to evaluating specific organizations' situations and requirements
 - d. Approach to tailoring change management plans to needs of specific organizations
3. Firm capabilities and resources in particular areas of expertise
 - a. Internal communications
 - b. Training and staff development
 - c. Implementation and deployment of new line-of-business computer systems
 - d. Space and relocation planning
4. Illustrative client experiences: one to three previous clients who can describe their experiences with the respondent's change management services
5. Any other information or suggestions you make have in providing services designed to meet stated program goals.

B. Questions Regarding the RFI

Questions regarding the RFI may be addressed in writing to John Chiappetta at john.chiappetta@calbar.ca.gov.

C. Addenda

The State Bar may modify the RFI prior to the date fixed for submission by posting, mailing, emailing or faxing an addendum to the bidders known to be interested in submitting a response.

D. Responses Due

Please submit 8 copies of your proposal submit your proposal, no later than 4 p.m. on May 25, 2012 to:

The State Bar of California
180 Howard Street
San Francisco, CA 94105-1639

Attn: John Chiappetta
Budget & Performance Analysis
(415) 538-2208
john.chiappetta@calbar.ca.gov

Respondents are solely responsible for all expenses associated with responding to this RFI. Responses to this RFI will not be returned. Unless otherwise required by law, the State Bar will treat as confidential those confidential materials clearly marked as such. The State Bar reserves the right to cancel or reissue this RFI, or to change the time for response or any other term of the RFI without obligation or liability.