

Request for Proposal: Legal Server Improvement Project

We will consider all responses that are sent to tabonds@atlantalegalaid.org by 5:00 pm EST on May 20, 2022. Please include the name of the project, "Legal Server Improvement Project Evaluation" in the subject line. All communication concerning this Request for Proposal must be directed to tabonds@atlantalegalaid.org. Any oral communications will be considered unofficial and nonbinding on Atlanta Legal Aid. Only written statements issued by the RFP Coordinator may be relied upon.

PROJECT DESCRIPTION

Atlanta Legal Aid Society, Inc. (Legal Aid) is requesting proposals from experienced evaluators who specialize in working with projects funded by the Legal Services Corporation (LSC). A familiarity with pro bono programs is preferred. The Legal Server Improvement Project (the Project) is funded through an LSC Technology Initiative Grant. The goal of the Project is to seek counsel regarding modifying Legal Server configurations that will simplify the intake process and ease of use for online applicants, staff, and volunteers. Legal Server is utilized as Legal Aid's primary online case management system.

Through the Technology Initiative Grant, this Project will:

- Create custom configurations in Legal Server, including a new intake process and homepage listview that allows Legal Aid to process phone and online intakes in a uniform way, along with a custom clinic profile.
- Develop up to five guided-navigation intake triage interviews to be used in both online and phone intake.
- Prepare and implement recommendations to improve intake and screening processes in Legal Server.

Legal Aid will focus on the following objectives:

- Improve the features and custom configurations in its online case management system Legal Server.
- Develop infrastructure improvements to Legal Server that enable staff and volunteers to conduct efficient client intake, screening, and advice appointments, including development of a robust appointment scheduling system, improvements to the Online Scheduler, and the development of workflows for SMS and email appointment notifications.
- Create custom configurations in Legal Server to simplify the phone and online intake process for online applicants, staff, and volunteers, including a new intake process and homepage listview that allows Legal Aid to process phone and online intakes in a uniform way which include a custom clinic profile, and up to five guided-navigation intake triage interviews to be used in both online and phone intake.

Planned improvements include:

- Develop Legal Server infrastructure improvements that enable efficient client intake (both online and telephone), screening, and advice appointments.
- Create Legal Server appointment notification workflows for staff, volunteers, and clients. These workflows will use SMS messages and/or email to provide appointment confirmation, appointment reminders, and notification of appointment or cancellations.
- Develop Legal Server user interface improvements will allow Legal Aid to track screening and intake appointments as well as view “prescreen” telephone applications together with online intakes in one list on the homepage.
- Create up to five guided-navigation interviews for both online and standard telephone intake. The interviews will help staff and volunteers triage the 5 common family law topics.

WHO WE ARE

Atlanta Legal Aid provides free legal help to low-income metro-Atlantans to help meet basic needs. Legal Aid handles approximately 20,000 cases each year. About one-third of these cases are family law. Every week, Legal Aid processes nearly 130 family law applications. About 20 percent of those applications begin as online applications. The volume of Legal Aid’s family law applications increased with the launch of online intake at the beginning of the COVID-19 pandemic. While an important additional access point for applicants, it has also increased the volume of applicants with low-priority family law cases. Legal Aid currently maintains a decentralized intake system, spread out over 5 county offices.

PROJECT SCHEDULE

Objective	Deadline
RFP released	May 10, 2022
Responses due	no later than 5pm EST May 24, 2022
Successful bidder announced	May 31, 2022
Evaluator submits a work plan and timeline for approval	June 10, 2022
Contract signed and work commences	June 17, 2022
Draft evaluation report	August 19, 2022
Review and revision process	September 23, 2022
Final draft of evaluation report due	October 7, 2022

PAYMENT

Payment arrangements will be negotiated with the successful vendor and may include monthly invoices with 30-day net terms, or 3-4 installments based on agreed upon milestones. With any payment arrangement, the final invoice or payment will be made upon satisfactory completion of final usability testing tasks.

THE INFORMATION WE NEED

For consideration, please provide:

1. Vendor's Name, address, federal tax identification number or Social Security Number (SSN), Uniform Business Identifier (UBI) number, and a description of the vendor's legal status, e.g., corporation, sole proprietor, etc.
2. Vendor contact's Name, telephone number, fax number and email.
3. A statement that guarantees that the response constitutes a firm offer valid for sixty (60) days following receipt and that Legal Aid may accept any time within the 60 day period.
4. A statement on whether the vendor or any employee of the vendor is related by blood or marriage to an Legal Aid employee or resides with an Legal Aid employee. If there are such relationships, list the names and relationships of said parties. Include the position and responsibilities within the vendor's organization of such vendor employees.
5. State whether the vendor has been a party in any litigation during the past five (5) years, all such incidents except employment related cases must be described, including the other parties' name, address, and telephone number. Present the vendor's position on the matter.
6. Provide two (2) references for evaluation projects you have completed. Please include a phone number or email address of the referenced individual so he/she may be contacted.
7. Provide an estimated number of hours you believe the project will take.
8. Provide a statement of your compensation requirements. Proposals that exceed 10 pages in length will not be accepted. Late proposals will not be accepted and will be automatically disqualified from further consideration. Vendors must respond to each question/requirement listed above. In preparing their response, vendors should restate each requirement and then give their response.

SELECTION CRITERIA

We will consider all responses that are sent to tabonds@atlantalegalaid.org by 5:00 pm EST on May 24, 2022. Please include the name of the project, "Family Law Centralized Intake Project Evaluation" in the subject line. The following will be key factors in our decision-making process:

- Demonstrated commitment to exceptional customer service and responding to client requests in a timely fashion
- Experience working with legal aid organizations on program evaluations Past performance working with Legal Aid (if applicable)

- Price that is commensurate with the value offered by the firm/individual and ability to work within a budget
- Responses are presented in a clear, organized, and logical manner
- Candidate has successfully completed similar projects and has the qualifications necessary to undertake this project
- Can demonstrate detailed-oriented nature