



REQUEST FOR PROPOSAL

December 16, 2024

Requests due back to Laurie Heer Dale by end of business ***Monday, February 3, 2025.***

lheerdale@legalaidofnebraska.org



Project Name: Intake Business Process Analysis (BPA)

Responses Due: *Monday, February 3, 2025*

Legal Aid of Nebraska
209 S 19 St, Ste 200
Omaha, NE 68102

Contact name: Laurie Heer Dale

Contact email:

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Contact Phone Number: 402.490.7328

Purpose:

The purpose of this Request for Proposal (RFP) is to request bids to conduct a business process analysis of our intake system and associated technologies. The objective is to improve efficiency, streamline processes, and enhance client service. Our goal is to create an accessible, uniform, and efficient intake system that reduces bottlenecks, improves equity in client experience, and increases access to justice across the state. The evaluation should assess our current intake workflows and technologies used across our multiple portals including: telephone hotline, online intake, local office or project-based intakes, partner referrals, and intake at off-site outreach and for off-site clinics. The final deliverable will include an analysis of the existing intake system, a process map, an environmental scan, a gap analysis, a recommended process redesign, and implementation roadmap. This evaluation will serve as the foundation for streamlining our processes and improving service delivery.

Organization Overview:

Legal Aid of Nebraska is a nonprofit law firm providing free civil legal services to low-income and elderly residents statewide. Legal Aid is the sole provider of free and direct civil legal services in Nebraska, covering all ninety-three (93) counties. We help with a wide range of legal issues including family law, housing, access to public benefits, employment and consumer issues. With seven (7) offices and nearly ninety (90) staff members, our services range from information and referrals, counsel and advice, legal education, clinics, and direct legal representation.

Current Intake System Description:

Legal Aid processes over 19,000 requests for assistance annually. Our intake pathways include:

1. Hotlines

- a. Managed by the CIU
- b. Primary intake method established in 2000.
- c. Staffed by eight intake paralegals and three attorneys.
- d. Operates several hotlines with distinct toll-free numbers and varying hours Monday–Friday.

2. **Online Intake:**

- a. Managed by the CIU.
- b. Accessible 24/7 through Law Help Nebraska, an online intake and triage system with options clients will receive a scheduled call back upon completion of the application.
- c. Feeds directly into PIKA, our case management system, with follow-up by CIU staff.

3. **Direct partner referrals**

- a. Managed by the CIU and other specialized programs and projects.
- b. Sent by email or faxed to CIU or project.
- c. An application is initiated and the applicant is called to complete the application.

4. **Other Pathways:**

- Four (4) walk-in self-help centers hosted by local offices open differing hours.
- Intake by a local office or project on-site or off-site.
- Clinics with intake processed by clinic staff through an application on our website.
- Specialized hotlines for the Native American Program and the Farm and Ranch Program.

While most applications initially went through CIU, intake has decentralized as programs have expanded.

Approximately 59% of applications are processed over the phone, and 20% come through the online application system. Six percent (6%) come in through outreach; and, 9% of applicants walk into our Access to Justice centers. The ACLU sends 1% as inquiries. Other partnering agencies send 5% of applications as priority referrals.

Sixty-two percent (62%) of all intake comes through the CIU, while the remaining 38% come to us through our programs and projects.

Challenges:

- The volume of applicants to the CIU exceeds capacity, leading to delays and frustration for both clients and staff.
- Intake processes outside CIU vary widely, creating inefficiencies and inconsistencies and inaccuracies.
- A need for better integration, uniformity, and efficiency across all pathways.

Legal Aid uses 3CX for our call center. We also use Microsoft Teams, SharePoint, Outlook, and Law Help Nebraska.

Short project description:

Legal Aid is seeking a consultant to conduct a business process analysis of our procedures for intake, triage, advice, and referral. The evaluation should provide a baseline for future improvements focusing on client experience, staff workflow and organizational efficiency. The recommendations must prioritize justice, equity, diversity and inclusion.

Scope of Work:

- 1. Review Current Processes and Technology:**
 - Evaluate intake workflows, technologies, staff user experience, and client access.
- 2. Process Documentation:**
 - Document each intake pathway comprehensively.
- 3. Efficiency Assessment:**
 - Identify bottlenecks, redundancies, and inefficiencies.
- 4. Stakeholder Engagement:**
 - Conduct interviews/surveys with staff to gather insights.
 - Obtain feedback from community partners on referral and intake challenges.
- 5. User and Client Testing:**
 - Conduct testing to evaluate staff usability and client experience.
 - Document and analyze findings.
- 6. Gap Analysis:**
 - Identify discrepancies between current practices and desired outcomes.
- 7. Environmental Scan:**
 - Assess external legal services landscape to identify opportunities for collaboration and reduce duplication.
- 8. Recommendations and Roadmap:**
 - Provide actionable recommendations and a feasible implementation plan.

Legal Aid staff will assist the consultant with sending out surveys, coordinating interviews, and providing necessary data for the evaluation.

Deliverables:

- 1. Project Plan:**
 - Detailed timeline and methodologies.
- 2. Process Documentation:**
 - Comprehensive review of current workflows and technologies.
- 3. Stakeholder Insights:**
 - Findings from staff interviews and community partner feedback.
- 4. Testing Results:**
 - Results of user and client experience testing.
- 5. Process Maps:**
 - Visual representations of each intake pathway.
- 6. Environmental Scan Report:**
 - Analysis of external legal service providers.
- 7. Gap Analysis Report:**
 - Identification of inefficiencies, redundancies, and inconsistencies.
- 8. Final Evaluation Report:**
 - Analysis of current processes.

- Process maps of intake pathways.
- Environmental scan findings.
- Gap analysis outcomes.
- Recommendations for process redesign, technological solutions and next steps.

Timeline of Deliverables:

- **December 16, 2024:** RFP released
- **January 13, 2025:** Consultant questions due
- **February 3, 2025:** Responses due no later than 5:00pm
- **February 17, 2025:** Invitation to meet
- **February 24, 2025:** Selected consultant announced
- **February 28, 2025:** Contract signed
- **March 1 – May 30, 2025:** Evaluation conducted
- **June 30, 2025:** Draft Report issued
- **July 31, 2025:** Staff Review and Comment Due
- **August 29, 2025:** Final Report issued

Project budget: \$35,000

- Please describe in detail the fee structure you propose for providing evaluation services.

How to Apply:

Please send RFP responses and inquiries to lheerdale@legalaidofnebraska.org with the subject line “Legal Aid BPA Proposal” by end of business **February 3, 2025**.

Response Requirements:

- Describe your/your firm’s capabilities. Specifically, include your experience working with nonprofits, law firms, and/or legal aid organizations, and your ability to provide each of the above identified Project Deliverables.
- Sample documents and presentations from previous similar projects.
- Methodology detailing the approach for conducting stakeholder interviews, process mapping, environmental scan and gap analysis.
- Project outline and timeline.
- Line-item proposal with detailed information about what expenses will be covered under each cost, and any variable expenses (e.g., travel reimbursement).
- List of principal consultants who will work directly on each component of this project, as well as their qualifications.
- Client list, highlighting successful intake process mapping work.
- Three references from past clients.
- Any additional information you deem pertinent to consultant selection.

Selection Criteria:

The successful consultant will be chosen through a qualitative review of these factors. The following

criteria will be used to evaluate proposals received:

- Knowledge, expertise and experience in the planning, project management, and execution of the services for which they are responding.
- Experience and past performance.
- Capability of proposed solution.
- Cost of services provided.

The consultant will be selected solely by the judgment of Legal Aid. The final decision is the sole decision of Legal Aid and the respondents to the RFP have no appeal rights or procedures guaranteed to them. Consultant(s) selected will be evaluated in part on the ability to deliver products on time and within budget, and their demonstrated understanding of the solution required based on their responses and subsequent interviews.

Process:

Following receipt and review of the proposals selected consultant(s) may be invited to an interview at Legal Aid's sole discretion based on evaluation of each respondent's proposal. Legal Aid reserves the right to reject any and all responses, and to waive any irregularities of information in the evaluation process. The selected consultant(s) will be given an opportunity to present their proposal in detail. Those directly responsible for the design of this project will be expected to attend. Although Legal Aid may conduct interviews to select among the final candidates, it is not Legal Aid's intent to seek extensive clarification of the proposals received. Therefore, it is to the benefit of the respondent to provide an explicit, detailed, and complete discussion of the work in the proposal.

The proposal should be organized in the following manner with the subject headings and sequence indicated.

- *Introduction*
- *Experience and Past Performance*
- *Organization and Personnel*
- *Proposed Solution(s) - Based on Description of Services*
- *References*
- *Pricing, Hourly Rates and Other Fees*

Any questions regarding this RFP must be submitted by e-mail to Laurie Heer Dale, lheerdale@legalaidofnebraka.org by end of business **Monday, January 13, 2025**. All questions will be answered promptly. Responses to inquiries that substantially or materially change the RFP will be made available to all prospective consultants.

Additional Information:

All costs associated with responding to this RFP are the sole responsibility of the responding consultant.

Submitted responses to this RFP become the property of Legal Aid. Legal Aid reserves the right to use any and all ideas included in any response without incurring any obligations to the responding consultant or committing to procurement of the proposed service.

END

