



Request for Proposals – Telecommunications System

Project Overview

The Legal Aid Society of Cleveland (Cleveland Legal Aid) seeks to purchase a cloud-based Voice over Internet Protocol (VoIP) telecommunications system. Cleveland Legal Aid seeks proposals from qualified vendors to provide a telecommunications system whose architecture robustly supports a variety of on-site and remote work staffing models for all staff and with advanced features supporting the operation of a centralized client intake call center. The objective of the system is to improve communication among staff and with our clients and volunteers whether they are working from our offices, working in the field, or working from home.

Organization Background/Overview

Cleveland Legal Aid is Northeast Ohio's largest nonprofit law firm. We take a comprehensive approach to providing high quality, civil legal services to those with low income. Cleveland Legal Aid handles cases that impact basic needs such as health, shelter and safety, economics and education, and access to justice. Our 136-person firm, along with approximately 50 in-house volunteers, has four offices in Cleveland, Elyria and Jefferson. We serve Ashtabula, Cuyahoga, Geauga, Lake, and Lorain counties.

Cleveland Legal Aid has a centralized intake group which operates on a call center model using an on-prem Mitel-based VoIP system. The current system makes use of advanced features such as ACD queues, and we advertise nine intake numbers to the public corresponding to different languages. We also have a specialized tenant info line, a worker info line, and an SMS-based legal information system.

We provide a range of legal assistance to serve individuals with low income that face civil legal problems. These services range from full legal representation by an attorney, to brief service about a legal situation both in person and over the phone.

Overall, we assist in over 6,600 cases annually. A majority of these cases are served through the operations of our call center systems. The call center opened 17,000 intakes in 2021 and received over 30,000 calls.

Project Need

In response to the COVID-19 pandemic, Cleveland Legal Aid staff began working primarily from home in 2020. Recently, Cleveland Legal Aid staff have started to return to the office. Seventy percent of Cleveland Legal Aid staff work in a hybrid format. Several staff members work on site at different community locations, not in Cleveland Legal Aid offices. The ability to use all features of the phone system effectively, in the office, from the field or from home is a critical priority. Staff must be able to communicate with clients and community partners while maintaining the privacy of their personal cell phone number. Centralized intake unit staff must be able to make and receive calls through the centralized intake system with the same functionality whether they are in-office or remote.

Project Scope and Deliverables

We are ideally seeking a single telecommunication system and vendor to meet all our needs but are open to alternatives if a strong business case can be made for such an approach and so long as the vendor can devise a unified strategy for how disparate systems and vendors would work together.

We are also seeking a vendor who is able to provide holistic, 360-degree support for the phone system, including not only support for the core system but also support for its connected desk phones, conference phones, and headsets. We are seeking a provider who can work together with Cleveland Legal Aid's IT managed service provider, offer on-site support as needed within an annual support agreement, as well as assumption of responsibility for liaising with PSTN carrier services to resolve all issues which arise, including those that are attributable to the PSTN carrier.

Currently, we are engaged with several different telecommunication platforms and vendors in various ways. Our current systems and vendors include:

- A vendor who is responsible for core functionality of our Mitel-based phone system but who does not provide support for headsets, conference phones, or managed carrier services, and does not provide extensive on-site support. In-house non-IT administrative and centralized intake staff have historically co-managed account creation/termination, reporting tasks, and programming of the system with this vendor.
- A general IT managed service provider which has assumed some responsibility for the phone system hardware issues not managed by the Mitel vendor.

- A carrier broker which interfaces with Lumen (CenturyLink)’s SIP trunks.
- An older Mitel system which connects to the PSTN with SIP trunks and depends on on-premise equipment. While in theory the system supports mobility options (iOS/Android mobility app and Windows softphone clients), in practice these features do not function optimally. Consequently, staff resort to using external line “follow-me” and call forwarding to personal devices, which also do not work in an ideal manner.
- A virtual fax service independent of the Mitel phone system.
- A two-way SMS messaging system integrated within the firm’s LegalServer law practice case management system, also independent of the Mitel system.

Cleveland Legal Aid recognizes that it is not possible to consolidate all of the above to a single platform through a single vendor. However, we are seeking to consolidate and simplify management of the telecommunications environment described above as much as possible while at the same time modernizing our infrastructure and alleviating historic problems we have had with the current system.

Cleveland Legal Aid seeks a system which effectively and comprehensively supports telecom operations needs for all staff whether working on-site or remotely. Further, Cleveland Legal Aid seeks a system that will provide a high level of detail regarding call analytics within the centralized intake unit. Call data will be used to evaluate volume, timing and completion rates for the purposes of scheduling staff, managing call capacity, and promotion of our services.

Project Timeline and Proposal Review Process

It is Cleveland Legal Aid’s intent to have open, fair and communicative interactions with vendors who are interested in submitting proposals and who feel their services are a good match for Cleveland Legal Aid’s needs.

At any time between issuance of this RFP and the RFP deadline of May 20, vendors may schedule a time to talk with Cleveland Legal Aid’s procurement consultant, Alex Clark of Clark Management Consulting, to ask questions about the RFP and Cleveland Legal Aid’s business needs and challenges. These would be informal conversations, the purpose of which is to help vendors understand Cleveland Legal Aid’s needs and objectives before vendors invest significant time into proposal development and demos. Clark Management Consulting does not have authority to make any agreements or authoritative representations on behalf of Cleveland Legal Aid, and these calls are informational only. These calls can be scheduled directly with Alex Clark through <https://calendly.com/cmc-alex/15min>.

Vendors may also submit formal written questions to Cleveland Legal Aid. These questions should be directed via email to alex@clarkmanagementconsulting.com, and their receipt will be acknowledged promptly. These questions have a deadline of Friday April 29th, and Cleveland Legal Aid's internal telecommunications committee will respond to them with all questions and answers circulated to interested vendors by Monday, May 2.

Cleveland Legal Aid requests that all interested parties submit a proposal by **May 20, 2022**, via email to our procurement consultant, alex@clarkmanagementconsulting.com. Alex will confirm receipt of all proposal submissions upon receipt. If your company does not receive a confirmation within 24 hours, please call Alex Clark at (402) 960-1718.

Cleveland Legal Aid will not pay any contractor costs associated with preparing responses or proposals submitted in response to this RFP.

Cleveland Legal Aid's internal telecommunications committee will review submitted proposals and invite selected vendors to schedule product demos as vendor and committee schedules allow between May 23rd and June 29th. Cleveland Legal Aid has a target date of June 30, 2021, for notification of selection of the vendor. Vendors not selected will also be notified by June 30, and all vendors may reach out to Alex Clark at any time for updates on the status of the selection process. Vendors will be notified if the selection timeline is extended.

Our goal is to have a contract with the selected vendor signed by July 15th at the latest. Selected vendors should be available to begin work immediately after selection. Project completion (license/equipment procurement, number porting, system staging and programming, staff training, and cutover) must occur no later than September 12, 2022.

RFP Submission and Formal Question Period Opens:	April 20, 2022
End of RFP Question Period:	April 29, 2022
Deadline for Responses:	May 20, 2022
Evaluation Period:	May 23 to June 29, 2022
Vendor Selected and Notified:	June 30, 2022
Contract with Vendor Signed & Project Initiation:	July 15, 2022
System Cutover & Project Conclusion:	September 12, 2022

Submission Requirements

All responses should be concise and well-organized, and demonstrate how your proposed services, approach and methodology, experience, and terms can meet or exceed Cleveland Legal Aid's requirements. All proposals must also contain the following for each vendor:

Vendor Information

- Vendor's full name, address, telephone number, email, and website.
- Your submission point-person. Please include title, phone number, and email address.
- Company overview information, such as a brief history, mission, number of employees, number of years in operation, etc.
- Three (3) recent references concerning your experience with the work described in this RFP. Indicate the reference's name, title, telephone number, email address, and a brief description of the services provided.

Project Summary

- A summary of your understanding and approach to the project.
- Proposed project timeline.

System Functional Requirements

Cleveland Legal Aid has developed a detailed Excel-format functional requirements worksheet to guide our evaluation process with vendors. We are asking that all vendors complete the worksheet and include it as an appendix to their submitted proposals. The worksheet should be completed in its entirety, but vendors should feel free to include supplemental information about the capabilities of their proposed system and support services.

Pricing and Pricing Methodology

Cleveland Legal Aid recognizes that a comprehensive telecommunications system is complex with many components and decisions to be made in a collaborative manner with the selected vendor such as exact numbers of headsets, desk phones, licenses, numbers of DIDs and TF numbers, carrier call minute packages, etc. Accordingly, we are not asking for a single fixed

and firm dollar amount for the project at the proposal stage. This will be determined during the contract negotiation stage if selected.

However, we are asking for enough information about pricing and costs to get a general sense of all costs involved and to support best value determinations between vendors. Accordingly, vendor proposals should include the following pricing information and components:

- Pricing should be itemized and include a written explanation of all fees and costs to the greatest extent possible at this early proposal stage.
- Pricing should include monthly recurring support and licensing fees both for the core system as well as per-user, per-extension or per-line costs.
- Pricing should include total installation and on-boarding costs.
- Provided pricing information should include carrier pricing and plan information, including:
 - Local calling price information
 - Included allowances for long distance calling
 - Rates for in-bound toll-free calls
 - Taxes and surcharges
- Pricing should include the length of the term for the quoted rates and renewal options.
- Although exact numbers of needed desk phones, headsets, conference phones, etc. will be determined later, vendors should include information within their proposal listing prices for examples of supported equipment on a per-unit basis, (e.g., several options for different models of phone, conference phone, headsets, etc. and their prices)
- Provide a description of how price changes and notifications would be handled.
- Pricing must include all overhead and travel costs needed to complete the work in the proposal.

Other Information

Applicant is encouraged to provide other information or material that it believes is relevant to Cleveland Legal Aid's evaluation or that provides additional features or value to Cleveland Legal Aid.

Some examples of additional value may be:

- Experience working with civil legal aid organizations.
- Capacity for and experience with significant and novel innovation in using telecommunications technology to enhance service delivery to customers (e.g. unique

integrations with other technology systems, telecom system integrations with artificial intelligence technologies, etc).

- Firm's commitment to diversity, equity, and inclusion.
- Project case studies highlighting the successful and timely implementation of critical, complex projects.

Evaluation

The contract will be awarded to the vendor who provides the best value – the most advantageous balance of price, quality, performance, and features – to Cleveland Legal Aid. Proposals will be evaluated based on the following criteria:

- Price
 - The reasonableness of the price for the service being provided
 - Whether the price is realistic, reflects a clear understanding of Cleveland Legal Aid's need, and is consistent with other parts of the proposal
- Quality
 - Qualifications and experience of company
 - Technical expertise and approach
 - Level of response detail
- Performance
- Commitment to diversity, equity, and inclusion
- Capacity, including open API for potential communication with other systems
- Understanding of and ability to meet Cleveland Legal Aid's needs
- Responsiveness to Cleveland Legal Aid
- Professionalism
- Quality of references
- Reputation for excellence in price, performance, quality, and service

Cleveland Legal Aid's Rights:

Cleveland Legal Aid reserves the right to:

- Conduct discussions with respondents and accept revisions of proposals after the closing date;
- Make an award based upon various selection criteria;
- Request clarification from any respondents on any or all aspects of their proposals;
- Cancel or re-issue this RFP at any time;
- Retain all proposals submitted in response to this RFP; and/or
- Invite some, all, or none of the respondents for interviews, demonstrations, presentations and further discussion.