Request for Proposal

## Project: Microsoft Suite Training and Microsoft Word Customization

# Introduction

Through this Request for Proposal (RFP), Virginia Legal Aid Society, Inc. (VLAS) seeks responses from consultants interested in guiding VLAS through a business process analysis and improvement to maximize the effectiveness and adoption by users of Office365 applications in legal service delivery. This project is funded by a Technology Initiative Grant (TIG) awarded by the Legal Services Corporation (LSC) with a technology improvement budget of $25,000 for contracting and training.

# Organization Mission

The mission of VLAS is

“To resolve the serious legal problems of low-income people, promote economic and family stability, reduce poverty through effective legal assistance, and to champion equal justice.”

You can view our mission, strategic plan, and learn more about our work at [www.vlas.org/about-vlas/](http://www.vlas.org/about-vlas/).

# Organization Description

VLAS is a nonprofit law firm established in 1977 to provide free civil legal services to eligible low-income residents in 20 counties and six cities in Central, Southside, and Western Tidewater Virginia. VLAS serves these communities by providing free information, advice and representation in such legal areas as housing, healthcare, income and benefits, family issues including domestic violence, consumer and education.

## Mailing Address

PO BOX 6200

Lynchburg, VA 24505

## Phone

Administrative Office: 434-528-4722

# How to Submit

Send completed proposals by email to Kate Sigler at kates@vlas.org by April 15, 2021.

# Project Description/Intent

The Legal Services Corporation (LSC) has awarded VLAS a grant for a business process analysis and improvement to maximize the effectiveness and adoption by users of Office365 applications in legal service delivery. We will obtain at least three bids from consultants who can provide extensive Microsoft Office training and develop customized ribbons, toolbars, templates, and Quick Parts for document assembly in Microsoft Word to improve legal service delivery standards and increase program efficiency. We seek consultants who have experience assisting law firms, especially legal aid nonprofits.

Over the past two years, VLAS has conducted two technology assessments through an applicant-intake evaluation and managed services technology consultant RFP process and implemented the recommended infrastructure changes. In late 2019 and early 2020, VLAS transitioned from an on-premise phone system to a cloud-based VOIP business phone and contact center, migrated its on-premise servers to Microsoft Azure, implemented Microsoft InTune and transitioned to Office365 from Google.

With the help of a consultant experienced in training and customizing Microsoft Office products, VLAS will first perform a training needs assessment for all staff members. VLAS and the consultant will analyze the results to develop trainings tailored to VLAS’ needs in Microsoft Office Suite applications. Depending on the results of the assessment, this might include Microsoft Word, OneNote, and Outlook. Finally, with input from a cross-section of VLAS staff, including legal secretaries, intake paralegals, and attorneys, the Consultant will develop special ribbons, toolbars, templates and Quick Parts for document assembly as funding permits, in Microsoft Word. The entire project must be completed by February 28, 2022.

Due to funding limitations, the number of customizations implemented as part of this project will be limited to the grant budget. However, VLAS seeks to identify as part of this project additional customizations that would improve legal service delivery standards and increase program efficiency for future funding opportunities or projects.

# Persons Involved

Kate Sigler, the VLAS Director of Administration, is the project manager for the project. She is generally available from 9:00 am to 5:00 pm Eastern Time. Contact via email kates@vlas.org or phone 434-455-3095.

Margie Walker, the VLAS General & Technology Administrative Assistant, will support the project with Kate. She is generally available from 7:30 am – 1:00 pm Eastern Time. Contact via email margiew@vlas.org or phone 434-528-3571.

# Timelines/Milestones

Milestones may be adjusted as needed:

1. VLAS will select a consultant – April 2021
2. VLAS and Consultant will perform a Microsoft Training Needs Assessment – May 2021
3. Consultant will conduct Microsoft Trainings – June-August 2021
4. Consultant will survey key staff members and recommend toolbar, ribbon, templates and Quick Parts for document assembly customizations for the program – August 2021
5. Consultant will implement recommended customizations as budget allows – September-November 2021
6. VLAS will conduct user-testing of the customizations and provide feedback to Consultant – December 2021
7. Consultant will implement changes and provide demonstration training for all staff – January 2022

# Budget

We have received a grant of $25,000 to contract with a consultant for these services and trainings. VLAS does not currently have additional funding available for this project, although there may be opportunities in the future to implement additional recommended customizations.

# Bid Proposal Requirements

1. A brief description of the consultant, firm and contact information
2. A summary of experience on similar projects
3. At least two references for work done on similar projects
4. Quote for services (include any discounts applied)
5. Description of project services and deliverables
6. A rough estimate of time commitment and additional services not outlined in the RFP from VLAS staff
7. Estimated costs, including ad hoc hourly costs, for work not included in proposal
8. Any recommendations for altering the timeline and milestones

# Other Helpful Information

VLAS contracts with a managed service provider for its technology support, Proxios, located in Richmond, VA. The consultant will be required to work with Proxios for any customization implementations or changes to our IT infrastructure. VLAS has these existing technologies:

* Hardware
	+ Windows 10 laptops and workstations with Microsoft InTune
	+ VerizonWireless iPad and mobile phones
	+ RingCentral Office and RingCentral EngageVoice contact center
	+ Sophos firewall devices
	+ Nitel Fiber
	+ Microsoft Azure servers
* Software
	+ Office365 – Office Applications (Outlook, Word, Excel, PowerPoint), SharePoint, OneDrive
	+ KempsCaseWorks – case management system designed for legal aid organizations
	+ RingCentral and Microsoft Teams -- video conferencing and instant messaging
	+ Adobe Reader and Adobe Pro (select users)
	+ WestLaw and Bloomberg – online legal research
	+ PandaDocs – digital signatures
	+ BestCase – Bankrupty software
	+ Abila MIP Cloud Fund Accounting – accounting and finance management
	+ ADP – payroll management