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Request for Proposal (RFP)

SharePoint Business Process Improvement Analysis

Legal Aid of Southeast and Central Ohio  
1108 City Park Avenue  
Columbus, Ohio 43206

January 2, 2025

## Introduction

Legal Aid of Southeast and Central Ohio (LASCO) is a nonprofit, civil legal aid organization that serves 36 counties in Ohio. LASCO has 8 program offices spread across our service area and has decades worth of useful materials saved electronically. Historically, each individual program office maintained independent document management structures housed on local servers and each office had autonomy to name, structure and organize its files as it deemed necessary. Unfortunately, this created great difficulty for offices and substantive law teams to easily find and share relevant information aside from emailing documents back and forth.

In 2023, LASCO implemented a new instance of SharePoint to use for our document management storage. Our SharePoint has pages for each of our administrative functions (operations, human resources, training, development, communications, etc.) as well as pages for each office, and each page has its own document library. Now, every LASCO office has a way of accessing information and documents developed and originating from any other office. The technical infrastructure of this intranet is in place to allow the easy sharing of information, but the file structure is missing. When our SharePoint was implemented, we lacked the resources to be able to study the information housed in each individual office and substantive team to determine what was important, what was outdated, and how to harmonize the file structure. Instead, the information from all of the old servers was simply imported into the new SharePoint. This results in information being siloed and hard to find unless the person is a member of that specific office or team.

Additionally, we created a Legal Resources Hub as a part of the new instance of SharePoint which was designed to be a “one stop shop” for all staff regardless of substantive team or office location to find sample motions or briefs, legal research, impact plans, etc. Unfortunately, the folders for most of the teams in this Hub are empty. Despite internal efforts to develop a plan for sorting and moving older information into the new space and to capture newer information, most teams have not been able to do this. There is a lack of clear understanding and a plan for how to make this kind of change and to do

it uniformly. We also lack the expertise and plan needed to fully realize our vision of a truly shared set of documents and information.

## **RFP Project Description**

We seek to build upon the work we have already done to create a document management storage system that is organized, searchable and uniform across offices and substantive teams. We want our SharePoint to make it easier for our staff to share information to more effectively and efficiently serve our clients. To help transform our SharePoint into a fully optimized and useful source for document management storage and sharing of information, LASCO seeks a consultant to conduct a business process improvement analysis. The analysis will evaluate the document storage needs of at least one of our substantive teams and at least one rural office to do a deep dive into the types of information being stored as well as the information needs of that team and office. We envision this requiring the review of existing sources of data as well as interviews with multiple people from each team and office.

The findings of this informational gathering phase would be used by the consultant to put together a proposal for a new structure for the information to be stored. While it will be specific to the selected team and office, the goal will be for it to be general enough that it can be applied throughout LASCO. The consultant's recommendations would be shared out with LASCO's management team for feedback on how well the system could work across the program. The feedback would then be incorporated into a final proposed structure for LASCO's SharePoint.

## **Scope of Work**

The consulting process will include:

- Working with LASCO team to learn more about our office and team structures as well as our data structure
- Reviewing current SharePoint pages and document folders
- Meeting with key staff from at least one substantive team and at least one rural office
- Developing first phase of business process improvement analysis to determine how best to structure our SharePoint
- Presenting initial recommendations to managers and leadership team
- Engaging in discussions around the challenges LASCO faced with the implementation of prior changes to SharePoint
- Drafting a final proposed structure

- Working with identified substantive team and rural office to put together plan for implementing the necessary changes to make the proposed structure work, including any automation solutions for moving documents easier

## Key Deliverables

1. A written report synthesizing the consultant's evaluation and analysis of our current SharePoint (based on meeting with at least one substantive team and at least one rural office) along with detailed recommendations for improvements.
2. A proposed timeline for implementing the proposed improvements.

## Budget

We have up to \$30,000 for this consulting project. Proposals will be evaluated on total proposed costs and reasonableness of costs as well as other qualitative factors.

## Timeline

RFP Released – January 2, 2025

Responses due no later than 5 pm EST February 20, 2025

Successful vendor announced – March 10, 2025

Contract signed and work commences – March 2025

Present proposed structure to LASCO management team – July 2025

Work through challenges and develop plan for implementation – September 30, 2025

All Work completed no later than October 31, 2025

## Proposal Elements

Proposals should be sent electronically with the subject line "Proposal for SharePoint Business Process Improvement Analysis" to [jshier@lasco.org](mailto:jshier@lasco.org) no later than 5 pm Est on February 20, 2025 and should include:

- An executive summary of the proposal
- A detailed overview of the proposed approach to carrying out the business process improvement analysis
- A proposed budget
- Information on the consultant's background, capabilities and related experience
- A summary of projects for clients in the legal domain and in the non-profit, court or government realm
- Two references from previous related projects