

REQUEST FOR PROPOSALS: Online Intake Business Process Analysis and Improvement

I - Introduction

Lakeshore Legal Aid (hereafter Lakeshore) serves people living with low income, older adults, and survivors of domestic violence and sexual assault in a holistic manner to address clients' legal issues and improve our communities. Lakeshore provides free direct legal representation in southeast Michigan and Port Huron and client intake, advice, and brief legal services throughout Michigan via our attorney-staffed hotline. Our practice areas include housing, family, consumer, elder, education, and public benefits law.

Lakeshore has approximately 240 staff members across 9 buildings in the Metro Detroit area.

Lakeshore values diversity. Lakeshore's internal equity statement prioritizes racial equity, justice and inclusion.

II - Description of Work to be Performed

Lakeshore seeks the services of a qualified vendor (hereafter called "vendor" or "applicant") to work in cooperation with Lakeshore staff to map, analyze, and make recommendations to the Lakeshore online intake process.

Lakeshore is seeking a vendor with extensive experience in business process analysis and who has worked previously with non-profit organizations, preferably non-profit legal aid organizations.

Lakeshore partners with many other non-profit organizations across the state of Michigan to process online intakes for potential clients with civil legal needs. Multiple departments within Lakeshore process online intakes depending on the source of the submission and subject matter. Online intakes submitted by the general public are most often processed through Lakeshore's attorney-staffed hotline. Potential clients are called back once, but often do not pick up the calls. Lakeshore does not currently have a meaningful way to schedule a time for returned calls or intake appointments. Lakeshore staff are often unable to connect with potential clients who submit online intakes.

Online intakes are also used for Lakeshore outreach clinics. Those intakes are submitted by a specific targeted population rather than the general public. Most often those clients are present on-site at the outreach clinic location with Lakeshore staff and

there is a much higher rate of continued contact with those potential clients. Other online intakes are targeted to potential clients with a specific legal issue in anticipation of an in-person appointment at an outreach clinic. However, each clinic team process the intakes differently after submission.

For online intakes, Lakeshore relies on JusticeServer case management system and Form Assembly.

III - Schedule and Key Dates

RFP Issued: September 20, 2024

RFP Submission Deadline: October 11, 2024

Submission Meetings: October 21 – November 1, 2024

Notice of Selected Submission: On or about November 4, 2024

Potential review by Board of

Directors and funders: November 4 – December 6, 2024

Proposed Project Initiation date: December 9, 2024, or sooner

IV - Scope of Services

A. The project will address:

1. Identification, mapping, and documentation of current practices.
2. Interview and/or survey staff and other impacted persons working in the processes listed in this RFP.
3. Assess the efficacy of existing systems, identify bottlenecks and redundancies including technological inefficiencies.
4. Recommend changes needed to optimize processes. Lakeshore is specifically interested in how AI-powered technology could assist in process improvement.
5. Provide an implementation roadmap addressing the recommended changes.
6. Partner with staff to implement changes including new process building, testing prior to implementation, implementation and measuring outcomes for a period of time post implementation.

B. Project deliverables include:

1. Project Plan
2. Documentation of current workflows and technology including a process map
3. Documentation of interviews and surveys with staff and impacted persons
4. Recommendations for process improvements and including proposed

process map and technology suggestions

5. Implementation plan which includes testing prior to implementation
6. Evaluation plan after implementation

C. If selected for a proposal meeting, the vendor must be prepared to discuss:

1. The vendor's approach to business process mapping including management of staff expectations.
2. Discuss the vendor's experience working with technology to implement changes including experience exploring AI related solutions.

D. It is preferred that vendor's experience includes:

1. Experience and expertise in supporting non-profit organizations, preferably non-profit law firms;
2. Understanding of Salesforce and Form Assembly preferred but not required.

V - Evaluation Criteria

Contract will be awarded to the applicant who will provide the highest quality performance and most advantageous cost structure. Quotes will be evaluated based on the applicant's ability to meet section IV-Scope of Services specifications based on following criteria:

Quality:

- Qualifications and experience. Proposals should describe the team that would be assigned to work directly with Lakeshore if awarded.
- Technical expertise.
- Ability to produce deliverables timely and adhere to the proposed timeline.
- Understanding of and ability to meet Lakeshore's needs.
- Capacity to perform the project to Lakeshore's standards.
- References.

Responses to this RFP should:

- A brief history of your firm including size, volume of business, locations, number of years in business and business philosophy.
- Information about your firm's commitment to diversity, equity, and inclusion.
- A description of your expertise in business process analysis and optimization.
- A description of any additional service options that may be of interest to Lakeshore.

Compensation Structure

- The reasonableness of the compensation.
- Whether the compensation structure reflects a clear understanding of Lakeshore's needs and is consistent with other parts of the proposal.
- Compensation structure reflects the applicant's qualifications and experience.

Willingness to Accept Lakeshore's Terms:

- Michigan governing law and exclusive venue.
- Indemnification: you agree to indemnify Lakeshore against third-party claims arising from your negligence, gross negligence, or intentional acts.
- Intellectual property: software and reports made for Lakeshore are work-made-for-hire and is the exclusive property of Lakeshore Legal Aid.

VI – Evaluation Process

A team of at least five Lakeshore staff members will evaluate applicants. The selection team will evaluate applicants on the applicant's ability to meet Scope of Services specifications according to section Evaluation Criteria listed elsewhere in this RFP. The selected applicant may require approval by Lakeshore's Board of Directors prior to award. Depending on the overall cost of the contract, the selected applicant may have to be funder-approved prior to the award.

Lakeshore reserves the right to:

- Accept or reject any or all proposals, or any part thereof;
- Waive any informalities or technicalities contained in any proposal received;
- 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 its proposals;
- Cancel or re-issue this RFP at any time;
- Retain all proposals submitted in response to this RFP; and
- Invite some, all, or none of the applicants for interviews, demonstrations, presentations and further discussion.

During the RFP process, you will not be given access to any confidential information, but you may request and be given information about Lakeshore's current providers, organizational information, etc. You agree not to use this information for your or any third-party's benefit and will not disclose this information to any person who does not have a need to know for purposed of responding to this RFP.

All information submitted by applicants may be shared with the Legal Services Corporation (LSC) or other funders and therefore may be subject to FOIA. Please identify confidential information contained in your proposal. Declaring more than 50% of your application as confidential, may preclude Lakeshore from considering it for review.

VII - Submission Instructions

Respond to this RFP by emailing your submission to Katie Strickfaden at kstrickfaden@lakeshorelegalaid.org no later than October 11, 2024, 2024 11:59pm EST. Please submit the entire submission in one PDF file.

To maintain a fair RFP process, Lakeshore will not be meeting with any vendors between issuance of this RFP and submission. However, vendors who are



considering submission may submit questions relating to this RFP by email to Katie Strickfaden at kstrickfaden@lakeshorelegalaid.org no later than 4:30 EST on October 7, 2024. Upon request, questions and answers will be provided to all applicants who are selected for product demonstrations.