



Project Name: Accounting/Finance Business Process Analysis

Responses Due: December 6, 2024, 5:00 PM Central

Legal Services of North Dakota
4007 State St, Ste 30
Bismarck, ND 58503

Contact name: Jen Lee, Executive Director

Contact email: jlee@lsnd.org

Contact Phone Number: 701-340-0470

Purpose

LSND seeks a qualified consultant to conduct a comprehensive business process analysis of its accounting and finance workflows. This analysis will help identify inefficiencies, recommend improvements, and provide a roadmap for optimizing technology integration and staffing.

Organization Overview

Legal Services of North Dakota (LSND) is dedicated to meeting the civil legal needs of low-income people throughout the entire state of North Dakota. We help with a wide range of legal issues including domestic violence, immigration, family law, housing, access to benefits, and consumer issues. We offer a full range of legal assistance, including information and referrals, counsel and advice, workshops, clinics, and direct legal representation.

Current Accounting/Finance Description

LSND operates with a small finance team, consisting of the Executive Director, a Chief Fiscal Officer (CFO), who serves as the primary accounting and finance employee, and an Executive Administrative Assistant who supports both the finance and management functions. This lean team structure reflects LSND's status as a small program, but also highlights the dire need for automation and technology efficiencies.

The primary systems used at LSND include:

- MIP Abila Accounting - Primary accounting software, handling financial transactions and record-keeping.
- Coastal Payroll - Outsourced payroll provider, managing payroll processing, quarterly tax filings, and compliance.
- LegalServer - Case management software, used for tracking cases, though with limited integration into financial workflows.

Due to the lack of integration and automation across these systems, many finance functions are managed manually, creating inefficiencies that this project aims to address.

Project Objectives

The selected consultant will be responsible for the following project objectives:

1. Document current accounting and finance workflows.
2. Identify gaps and inefficiencies, particularly those resulting from limited integration.
3. Propose recommendations to optimize workflows through technology and/or staffing adjustments.
4. Develop an implementation roadmap, including technology solutions and staffing recommendations.

Scope of Work

1. Initial Analysis and Planning
 - Kickoff Meeting with LSND to clarify project goals, deliverables, and data requirements.
 - Process documentation to map out current accounting and finance workflows, including data flows, reporting, manual processes, and key bottlenecks.
 - Technology review to evaluate existing systems (Abila, Coastal Payroll, LegalServer) and integration limitations.
2. Stakeholder Engagement
 - Interviews and Surveys - Engage with key LSND finance and operational staff to identify pain points and areas for improvement.
 - Benchmarking and Research - Compare LSND workflows to best practices in nonprofit finance operations, identifying suitable technologies for integration or automation.
3. Analysis and Recommendations
 - Gap analysis to outline areas where current workflows fall short of optimal efficiency.
 - Process improvement recommendations with a focus on:
 - Potential technologies for better integration.
 - Staffing adjustments to improve workflow efficiency.
 - Opportunities for automation.
 - Implementation Roadmap - Develop a detailed, prioritized roadmap for implementing recommended changes, including estimated costs, timelines, and resources needed.

Deliverables

1. Process Documentation - Flowcharts and descriptions of current workflows.
2. Stakeholder Feedback Summary - Insights from staff interviews and surveys.
3. Gap Analysis Report - Identification of workflow inefficiencies.
4. Recommendations Report - Detailed suggestions for technology and staffing improvements.
5. Implementation Roadmap - Step-by-step guidance for adopting recommendations.

Timeline of Deliverables

- November 6, 2024: RFP released
- December 6, 2024: Responses due no later than 5:00pm Central
- December 13, 2024: Consultant selection and notification
- December 20, 2024: Contract signed
- January-February, 2025: Evaluation conducted

- March 31, 2025: Draft Report issued
- April 15, 2025 – Staff Review and Comment Due
- April 30, 2025 – Final Report issued

Project Budget

The budget for this project is \$10,000. Proposals should include a fee structure outlining costs associated with each project phase and any variable costs.

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:

- Consultant should possess 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 LSND. The final decision is the sole decision of LSND 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 LSND's sole discretion based on evaluation of each respondent's proposal. LSND 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 LSND may conduct interviews to select among the final candidates, it is not LSND'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 Methodology*
- *Pricing, Hourly Rates, and Other Fees*
- *References*

Any questions regarding this RFP must be submitted by e-mail to LSND by **November 29, 2024, by 5:00 PM**. Please send questions to Jen Lee at jlee@lsnd.org. 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 LSND. LSND 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 services.