

# **TECHNOLOGY INITIATIVE PLANNING**

## **PROJECT MANAGER RFP**

### **1. INTRODUCTION**

Legal Aid of Wyoming Inc. is seeking a Project Manager to develop a technology plan for two projects, 1) establish a new online intake process and 2) upgrade its website to a mobile-friendly site. At the end of the planning process, LAW will be positioned to hire developers for both projects and apply for an LSC TIG implementation grant. The overarching goals of these technology initiatives are to increase client access to services through improved online education and convenient online intake, better prepare clients for meetings with their attorneys and legal proceedings, improve operational efficiency, and increase organizational support.

Maximum Amount of Award: \$22,000 for six months

The objectives for this project are to:

1. Develop consensus on specific/measurable goals that online intake and a revised website will achieve in helping us improve service access and delivery, and gather necessary baseline data against which to measure goals as the tech projects are implemented in the near future.
2. Create a content outline for a revised Legal Aid of Wyoming website, which will note information already present that can be repurposed on the new site, as well as missing information to be attained through additional research/writing. (We know we must spend significant time planning and researching for an improved client “self-help” section).
3. Create a Business Requirements Document (“BRD”) for the Online Intake project that documents the procedures and policies of the tool, the proposed intake question decision tree and technical components. The BRD will serve as the foundational document required to evaluate future contractors bidding for the job of developing our online intake system.
5. Develop a fundraising document we can use to garner financial support for implementation of our two technology projects (to supplement what we hope will be a TIG implementation grant).

### **2. REQUEST FOR PROPOSAL (RFP)**

Legal Aid of Wyoming, Inc. (“LAW”) is soliciting Requests for Proposals (RFP) from qualified companies, nonprofits or independent consultants (hereinafter Contractor) to act as a Project Manager. The goal is to select the most capable Contractor offering the most competitive price.

The Contractor will contract with, report to and be supervised only by LAW. However, the Contractor will have wide latitude to liase with, interview, and present findings regarding the project to personnel/stakeholders from the many other organizations listed in this proposal.

### **3. TIMELINE/DUE DATES**

1	RFP Release Date	October 19, 2018
2	RFP Questions Deadline	November 2, 2018
3	Response to Questions Posted on LAW's Website	November 9, 2018
4	Proposals Due to LAW*	November 30, 2018
5	Notice of Award Released	December 15, 2018
6	Draft Document Submitted to LAW	January 15, 2019
7	Final Document Submitted to LAW	June 15, 2019

Notes:

As part of the selection process, LAW and/or collaborating agencies may conduct interviews with a shortlist of proposal Respondents being considered for this contract.

Above-listed deadlines are an estimate. Actual deadlines will be negotiated with the selected Contractor.

### **4. INQUIRIES**

Questions regarding this RFP are to be submitted to Connie Lackey ([connie@lawyoming.org](mailto:connie@lawyoming.org)) (subject line: "TIP Project Manager Questions"). A consolidated list of questions and their answers will then be posted on LAW's website ([www.lawyoming.org](http://www.lawyoming.org)). Please see Section 3 for question deadline. **Questions regarding this RFP will only be accepted by email at the e-mail address provided.**

### **5. SUBMITTING PROPOSALS**

All final proposals and supplementary attachments must be emailed to Connie Lackey ([connie@lawyoming.org](mailto:connie@lawyoming.org)) by 5:00 p.m. Mountain Time (subject line: "Wyoming TIP Project Manager Proposal"). If the Respondent would like to send an additional hard copy of the proposal or additional materials to supplement the e-mailed version, submit to: Legal Aid of Wyoming, 1813 Carey Ave., Cheyenne, WY 82001. Proposals must be formatted for letter-size paper. Each page should be numbered and with Respondent's name.

The Respondent shall bear all costs associated with the proposal meeting(s), interview(s), preparation and submission of their bid. LAW and its collaborating partners shall in no case be responsible or liable for those costs, regardless of the conduct or outcome of the solicitation.

## **6. DESCRIPTION OF SERVICES**

If selected, the qualified Contractor will be responsible for:

Objective 1: Develop consensus on specific/measurable goals that online intake and a revised website will achieve in helping us improve service access and delivery, and gather necessary baseline data against which to measure goals when the tech projects are implemented in the future.

Activity a. Survey relevant LAW staff and board to further gauge scope of problem(s) and ideate achievable goals.

Activity b. Consolidate information gathered. Refine then finalize goals through additional brainstorming . Distribute to staff/board for buy-in and sign-off.

Objective 2: Create a content outline for a revised Legal Aid of Wyoming website, which will note information already present that can be repurposed on the new site, as well as missing information to be attained through additional research/writing.

Activity a. Review helpful TA materials LSC recommends for website standards as well as 3-5 strong Legal Aid websites as models.

Activity b. Submit request to LAW attorneys for suggestions of necessary pro-se/self-help materials necessary for the new LAW website.

Activity c. Submit draft written content outline for a new LAW website to steering committee for feedback.

Activity d. Finalize website's written content outline for new website.

Objective 3. Create a Business Requirements Document ("BRD") for the Online Intake project that documents the procedures and policies related to the new tool, the proposed intake question decision tree, and technical components. The BRD will serve as the foundational document used to attract and evaluate potential contractors bidding for the future task of developing our online intake system.

Activity a. Explore all TA materials LSC recommends regarding online intake tools, such as "Evaluating Online Intake: What We're Learning" and conduct at least two phone calls with other legal aid organizations that have implemented successful online intake projects according to LSC for best practice research.

Activity b. Convene steering Committee to develop Functional and Decision Tree components of online intake BRD

Activity c. Identify and hire an External Technology Advisor (“ETA”) to help with the non-functional parts of the BRD (latter half of intake planning process) and address any tech-heavy questions that Project Manager or Executive Staff may have during early process

Activity d. Purchase mind mapping software for Decision Tree development, such as xmind, mindomo or mindjet (suggested as helpful by another legal aid group in New Mexico that recently undertook a similar process)

Activity e. Develop Functional and Design Tree draft components of BRD

Activity f. Early Testing of Decision Tree Completed

Activity g. Non-functional portion of BRD developed by ETA

Activity h. Final BRD consolidated/completed

Objective 4: Develop an early fundraising document to garner financial support for implementation of these two technology projects (to supplement what we hope will be a TIG implementation grant).

Activity a. Create a 1-2 page document detailing need, introducing our intake and website solutions, and expected overall cost, which LAW can use to entice donors to support

**C. Contractor Presentation:** Contractor shall provide at minimum one (1) in-person presentation to LAW and Collaborative Working Group at the end of the engagement highlighting the process, findings, recommendations, and answering questions.

## **7.AWARD OF CONTRACT**

Award of the contract resulting from this RFP will be based upon the most responsive contractor whose offer will be most advantageous to LAW in terms of cost, functionality, experience, quality of past work, and other factors specified elsewhere in this RFP.

LAW reserves the right to 1) Consider proposals based on their relative merit, risk and values to the organization; 2) Negotiate with all service providers; 3) Reject any or all offers and discontinue this RFP process without obligation or liability to any potential contractor, when it is in the organization’s best interest; 4) Accept other than the lowest priced offer.

Proposals received will be evaluated by LAW and its affiliated partners on the following selection criteria:

1. Contractor’s demonstrated experience as a Project Manager.

2. Results of communications with client references supplied by Respondent (please submit the names, organization, phone number and e-mail of three contacts for whom you have conducted similar work in the past five years.)
3. Samples of similar work projects
4. Description of the approach Respondent proposes, specifically:
  - a. With the information provided in this RFP, how does the Respondent propose implementing the two projects?
  - b. How will the Respondent commit to meeting the deadlines listed in Section 3 if awarded this Contract?
  - c. What cost or efficiency suggestions does the Contractor have for the projects, if any?
  - d. What additional analysis or processes does the Contractor suggest be undertaken as part of this project, if any, and why?
5. Skills and experience of key personnel that would work on the project (please provide bios)
6. Familiarity with the Legal Aid and/or human services landscape
7. Price quoted for all items covered by the RFP, including an estimate of expenses that would be incurred. Please use estimated numbers provided in Section 6b as a guideline to help us evaluate all proposals on equal footing. We understand that sample sizes and strategies may change. This is just for initial submission.
8. Quality of Respondent communications and responsiveness during the RFP process

The successful Respondent may be asked to participate in negotiations and to make revisions to their proposal based on negotiations. This document represents an initial request for proposal only and in no way should be construed as a contract or letter of intent.

## **8. CONFIDENTIALITY**

All information disclosed by LAW and affiliated organizations during the proposal process shall be considered confidential and should not be released to outside parties. LAW and affiliated parties.

Likewise, all proposals from respondents will only be reviewed by LAW staff and relevant partners necessary for the fair selection of the Project Manager Contractor. Respondents' proposals will not be shared with Respondents' competitors, during or after the process.

## **9. PROJECT DELIVERABLES**

All recommendations identified during this engagement will be documented and reviewed with LAW and affiliated agency management. All deliverables produced during the engagement are for the sole use of LAW and affiliated agencies listed in Section 1 of this RFP, and will remain the property of LAW.