



LEGAL SERVICES CORPORATION
REQUEST FOR PROPOSALS FOR
NON-PROFIT OUTCOMES MANAGEMENT
ASSESSMENT

OPEN: JUNE 7, 2016
CLOSE: JUNE 30, 2016

INTRODUCTION

The Legal Services Corporation (LSC) is inviting proposals from qualified consultants to assist LSC in collecting and analyzing the outcomes data currently utilized by six preselected legal aid grantees in New York, Texas, and Virginia, and to develop both targeted and general recommendations for using outcomes data to drive strategic and resource allocations among all of LSC's grantees.

ABOUT LEGAL SERVICES CORPORATION

The Legal Services Corporation (LSC) is the single largest funder of civil legal aid for low-income Americans in the United States. Established in 1974, LSC is a private, 501(c)(3) nonprofit corporation that provides grants, program support, and oversight to 134 civil legal aid organizations with approximately 800 offices serving every state and territory. LSC distributes 92 percent of its revenue in grants to legal aid programs. Virtually all of LSC's grant funding comes from an annual Congressional appropriation. The Corporation is led by a bipartisan board of directors whose 11 members are appointed by the President and confirmed by the Senate.

The Legal Services Corporation was founded in 1974, when President Richard M. Nixon signed the Legal Services Corporation Act. The Act declared that Congress had found "there is a need to provide equal access to the system of justice in our Nation" and that "there is a need to provide high quality legal assistance to those who would be otherwise unable to afford adequate legal counsel."

In 2014, more than 63 million Americans – one in five – qualified for civil legal aid, while another 30 million reported at least two consecutive months of income at or below 125% of the poverty guideline. This means that more than 90 million people – one in three Americans – were eligible for civil legal aid at a time when federal and state funding does not begin to meet the need.

LSC works to leverage its limited resources by funding and promoting the use of technology to provide legal assistance and by working with its grantees to maximize their efficiency and effectiveness.

RFP OVERVIEW

Most legal needs surveys in the United States indicate that no more than 20 percent of low-income people with civil legal problems are able to get the

legal help they need. LSC's own 2009 Justice Gap report found that for every client who received assistance at a legal aid program funded by LSC, another person who sought legal assistance was turned away because of a lack of resources.¹

Legal aid providers need to be able to make informed resource-allocation decisions with the most reliable programmatic data available to them. Narrowing the justice gap will require a comprehensive approach that includes increased funding by federal, state, and local governments, and by private philanthropy, and by increased pro bono services from the private bar and law students. All of these partners need current, accurate, and useful data to maximize their effectiveness.

In 2013, the Public Welfare Foundation funded LSC to provide its grantees and others with better tools to assess their own performance, manage their operations, and increase private financial support through the use of outcomes data. One element of that project included a survey of grantees to inquire about current data collection and analysis practices and about data the grantees currently do not collect but would like to have to manage their programs more efficiently. In addition, LSC developed an online toolkit with resources and case studies of civil legal aid organizations that collect outcomes data (<http://clo.lsc.gov/>). The toolkit is a resource for LSC grantees and others to help them decide what outcomes to collect and how to do it. As of the beginning of 2016, all of LSC's grantees must certify that they have implemented an outcomes measurement system for extended service cases, provide a narrative description of the system, and report on how they are using outcomes data to manage their programs.

LSC now wants to move to the next phase of this project and work with grantees to help them use outcomes data most effectively. With the Public Welfare Foundation's support, LSC seeks to implement outcomes data systems that will inform strategic and resource allocation decision making. In addition to using the outcomes data to present to funders, LSC wants its grantees to be able to look to outcomes data to see what business and operational changes could be made to make their organizations more effective and efficient in servicing low-income individuals in need of civil legal aid.

¹ http://www.lsc.gov/sites/default/files/LSC/pdfs/documenting_the_justice_gap_in_america_2009.pdf

Through this assessment, LSC hopes to achieve the following outcomes:

1. Compile specific and practical examples of how civil legal aid organizations are currently collecting and using data.
2. Identify outcomes data that are currently being collected and analyze how they are and might be used to guide management decisions.
3. Perform in-depth analysis and develop recommendations for using outcomes data to drive strategic and resource-allocation decisions.
4. Provide legal aid programs with a better understanding of what outcomes data can contribute to strategic resource allocation decisions.
5. Compile specific and practical examples of how outcomes data can be used to improve priority-setting and service delivery to clients.
6. Increase knowledge among LSC staff and others on ways they can support grantee organizations in implementing more data-driven decision making and collecting useful outcomes data.

This is a fixed-price contract engagement. The compensation for this project may not exceed \$90,000, excluding travel costs and expenses.

DUTIES, TASKS, MILESTONES, AND DELIVERABLES

Duties and Tasks

LSC anticipates the consultant completing this project in three stages: (1) initial identification and assessment of outcomes measurement data; (2) in-depth assessment and case study of selected grantees; and (3) final report and recommendations.

Stage 1: Initial Identification and Assessment of Outcomes Measurement Data

During Phase One, the consultant will work closely with LSC to identify objectives and optimal outcomes measurement metrics and processes that will assist grantees in implementing more data-driven decision making and collecting useful outcomes data. This may include identifying program success factors, short-, mid-, and long-term outcomes and outcome indicators,

and methods and strategies for data gathering. The consultant will also work with LSC to conduct an initial assessment of the outcomes data being utilized by six preselected grantees (two each in Virginia, Texas, and New York). Based on the initial identification and assessment, the consultant will develop a project plan for the subsequent site visits to the selected grantees.

Stage 2: In-depth Assessment and Case Studies

For the second stage of the project, the consultant will conduct on-site case studies of each selected grantee's outcomes measurement data and practices. The evaluation should (i) provide an in-depth analysis of how the programs could better collect and use outcomes data to improve the delivery of legal services, (ii) evaluate what additional outcomes data would be helpful in assisting the program to make their organizations more effective and efficient in servicing low-income individuals in need of civil legal aid, (iii) recommend methods to enhance data-collection operations, (iv) evaluate emerging trends from existing data, and (v) evaluate how outcomes data can best be incorporated into management decisions about program priorities and service-delivery options. At the conclusion of this stage, LSC expects the consultant to present, in collaboration with LSC, its initial findings at the National Legal Aid & Defender Association conference in Indianapolis, Indiana.

Step 3: Final Report and Recommendations

During the final stage of the project, the consultant will provide detailed case studies for each selected grantee. The case studies should include recommendations tailored to each grantee regarding how it can best incorporate specific outcomes measurement data into management decisions about program priorities and service-delivery options. The consultant will also provide LSC with a detailed report addressing themes and trends across grantees and general recommendations that could be adopted by LSC's other grantees with respect to implementing measurable outcome key indicators and collection strategies.

Milestones and Deliverables

The successful evaluator will be responsible for performing according to the project schedule listed below:

DELIVERABLE	TIMELINE
Kick-Off Meeting at LSC's Office in Washington, DC	No later than July 15, 2016
Collaborate with LSC to identify objectives and optimal outcomes measurement metrics and processes that will assist grantees in implementing more data-driven decision making and collecting useful outcomes data	July 15, 2016 –August 15, 2016
Present LSC with project plan for each pre-selected grantee	By September 1, 2016
Conduct two-day on-site visits with each pre-selected grantee (two each in New York, Texas, and Virginia)	September 2, 2016 – October 15, 2016
Present report to LSC with initial assessment and overall themes	October 25, 2016
Collaborate with LSC to create presentation for National Legal Aid and Defender Association Conference in Indianapolis, Indiana	By November 1, 2016
Present findings at National Legal Aid and Defender Association Conference in Indianapolis, Indiana	November 9-12, 2016 (specific presentation date to be determined)
Prepare case studies on pre-selected grantees and final report and recommendations to LSC	November 15, 2016 –January 15, 2017
Final case studies and report and recommendations due to LSC	February 15, 2017

Estimated Contract Term and Schedule

LSC estimates that this project will take eight (8) months to complete. Work is expected to begin on **July 15, 2016 and be completed by March 1, 2017.**

Project Management

The consultant will work closely with LSC's Vice President for Grants Management, Chief Development Officer, and Director of Data Governance and Analysis. The consultant will also work with LSC's Technology Initiative Grant and Office of Information Technology staff. The successful applicant will be expected to come to LSC's office for the initial Kick-Off meeting and as needed, but otherwise will work remotely from their office. LSC expects to receive weekly progress updates from the consultant and to be notified immediately of any concerns or delays that may arise during the course of the engagement.

LSC will oversee the consultant's performance by signing a milestone-driven services agreement and payment schedule, and holding regular meetings on project status and coordination issues.

The successful consultant will be expected to comply with all LSC workplace policies, rules, and regulations. In addition, the successful applicant should demonstrate capability to meet the following requirements for project management:

- **Dedicated Team**
The successful applicant should have dedicated staff assigned to the project, including a primary point of contact for the duration of the engagement.
- **Location of Performance**
Applicant will be available at times to present its progress, finding, conclusions and recommendations to LSC in Washington, D.C. However, the applicant is not required to maintain a presence onsite at LSC or in Washington, D.C. The applicant must also be available to travel to the NLADA Conference in Indianapolis, Indiana and to the grantee sites in New York, Texas, and Virginia.
- **Project Management Plan**
The successful applicant shall, along with its proposal, submit a detailed plan for completing this project. The plan should include how the project will be managed, where the work will be performed, and how LSC will be kept apprised of progress.

- **Informal information exchanges**

LSC expects that the consultant will answer questions and discuss its progress on a regular basis throughout the engagement term. LSC will provide a primary point of contact at LSC to the consultant.

RFP SCHEDULE

DATE	EVENT
June 8, 2016	RFP issued
June 15, 2016	Deadline for respondents to submit RFP questions
June 22, 2016	LSC responds to RFP questions
June 30, 2016	Deadline for respondents to submit proposals
July 1 – July 7, 2016	Evaluation of proposals
July 8, 2015	Notification to successful applicant of preliminary selection and contract negotiation
July 12, 2016	Contract approval
July 15, 2016	Performance begins

RFP RELATED QUESTIONS

Please submit questions relating to this RFP by email to Helen Gerostathos Guyton at guytonh@lsc.gov no later than **5:30 pm EST, on June 15, 2016**. Answers to questions will be posted on LSC’s website at <http://www.lsc.gov/rfp-non-profit-outcomes-management-assessment>.

PROPOSAL SUBMISSION REQUIREMENTS

All proposals must be 15 pages or less (not including resumes, cover letters, and samples of comparable work), concise, well-organized, and demonstrate how your proposed services, approach and methodology, qualifications, experience, and terms meet or exceed LSC’s requirements. All proposals must also contain the following:

Applicant Information and Qualifications

Applicants should have extensive experience using both qualitative and quantitative outcomes measurement methodologies to support non-profit organizations, with a particular emphasis in the legal services field desired.

Knowledge of case management systems such as Kemps, LegalServer, Legal Files, PIKA, Practice Manager, Salesforce and Time is desirable.

To better evaluate your experience and qualifications, please include the following information in your application:

- Your full name, address, telephone number, contact person, email, and website.
- Firm overview, including a brief history, mission, number of employees, and number of years in operation.
- Your RFP point-person, including title, phone number, and email address.
- Your qualifications to provide the services requested.
- Your experience working with grant-making organizations.
- Your experience working with the legal aid community on outcomes measurement processes.
- Your familiarity with the case management systems described above, including in what capacity you have used such systems.
- Your experience presenting your findings to an audience, including, where possible, examples.
- Your initial plan to implement the scope of work.
- Your staffing plan.

Pricing and Pricing Methodology

- You must provide a fixed-rate budget for this project not to exceed the cap of \$90,000, excluding travel costs and expenses. Pricing must be itemized and include a written explanation of all included fees and costs. LSC is a 501(c)(3) tax exempt organization and is eligible for GSA Schedule pricing.

References

- Proposals should include professional references (including full contact information) concerning the applicant's performance on three (3) comparable, recent projects.

Other Information

- You may provide other information or material that you believe is relevant to our evaluation or that provides additional value to LSC.

PROPOSAL DEADLINES AND MODE OF DELIVERY

All proposals must be received by LSC **no later than 5:30 P.M., EST, on June 30, 2016**. Please email (in Word or PDF format) **and** mail one (1) hard copy of your proposal to:

Helen Gerostathos Guyton, Contract Coordinator
Legal Services Corporation
3333 K Street, N.W.
Washington, D.C. 20007
Phone: (202) 295-1500
Email: guytonh@lsc.gov

You are solely responsible for ensuring that your proposal is delivered on time. Late proposals may be accepted in LSC's sole discretion. You must bear all costs incurred in preparing your proposal; contract awards will not cover proposal costs.

PROPOSAL EVALUATION CRITERIA

The contract will be awarded to the vendor who provides the **best value** – the most advantageous balance of price, quality, and performance – to LSC. Proposals will be evaluated based on the following criteria:

Price

- The reasonableness of the price for the service being provided.
- Whether the price is realistic (especially if it is an estimate), reflects a clear understanding of LSC's need, and is consistent with other parts of the proposal.
- Cost by labor category (if a times and materials contract).
- The cost of incidental expenses, including taxes and service fees, administrative costs, maintenance/customer support costs, system or software conversion costs, travel and transportation costs.

Quality

- Qualifications and experience of consultant and proposed staff
- Technical expertise
- Project plan and approach

Performance

- Timeliness of deliverables
- Capacity
- Understanding of and ability to meet LSC's needs
- Responsiveness to LSC
- Professionalism of representatives (sales, customer support, technical assistance, designated consultants, etc.)

Reputation for excellence in price, performance, and quality

Willingness to accept LSC's terms (DC venue and governing law, no limitation on liability, no binding arbitration, indemnification, and estimated cost, but not to exceed clause.)

LSC's RIGHTS

LSC 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;
- Invite some, all, or none of the respondents for interviews, demonstrations, presentations and further discussion;

CONFIDENTIALITY

During the RFP process, you may be given access to LSC's confidential or proprietary information. 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.

FREEDOM OF INFORMATION ACT

The Freedom of Information Act (FOIA) and associated LSC regulations may require LSC to disclose certain documents to the public, including portions of

your proposal. Generally, LSC will not release any documents that would cause your vendor competitive harm. You are encouraged, however, to label any confidential information contained in your proposal to facilitate LSC's ability to withhold it from disclosure.