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## **Request for Proposal – Telecommunications Systems**

### **Project Overview**

Legal Aid of Nebraska (Legal Aid) seeks to purchase a Voice over Internet Protocol (VoIP) telecommunications system. Legal Aid seeks proposals from qualified vendors to provide a hosted VoIP phone system that has voice recording and transcription, an app for mobile users, fax capability via analog telephony adaptor for existing fax machines or virtual fax service, SMS sending/receiving, and call center functionality. The objective of the VoIP system is to improve communication among staff and with our clients and volunteers from both in our offices and in the field.

### **Organization Background/Overview**

Legal Aid of Nebraska is Nebraska's largest nonprofit law firm that takes a comprehensive approach to providing high quality, free, civil legal services and community education for people to protect their livelihoods, their health, and their families. Our 125-person firm is headquartered in Omaha and serves the entire state of Nebraska with offices in Omaha, Lincoln Bancroft, Grand Island, Norfolk, North Platte, and Scottsbluff.

We manage nine telephone intake hotlines, which operate in a hybrid model combining inbound queue-based call handling as well as scheduled outbound calls in response to voicemails and online applications for legal assistance. We provide a variety of legal assistance to serve low-income Nebraskans with civil legal problems. These services range from full legal representation by an

attorney, advice about a legal situation, and self-help DIY clinics and resources for common legal problems and guided interviews that complete court forms.

We provide some level of assistance to around 18,000 Nebraskans per year, and the overwhelming majority of individuals assisted are either fully or partially assisted through the operations of our hotline call center systems.

## **Project Need**

In response to the COVID-19 pandemic, Legal Aid staff began working primarily from home in 2020. Going forward, Legal Aid anticipates a 'hybrid' model of some staff working from home and some working in-office, in a wide range of job roles, including call center staff for the foreseeable future. Staff must be able to communicate with clients and community partners by phone and text while maintaining the privacy of their personal cell phone number, and centralized intake unit staff must be able to make and receive calls through the centralized intake system with the same functionality whether they are in-office or remote.

## **Project Scope and Deliverables**

We are ideally looking for a single telecommunication system to meet all of our needs but are open to the idea of two systems (one for regular staff and one for hotline workers) so long as the vendor can devise a unified strategy for how the systems will work together.

Currently we are using several different telecommunication platforms in various ways. This occurred due to vendor lock-in to a system which did not have all the features necessary for our transition to remote work and remote service delivery during the covid-19 pandemic. Our current systems include:

- An on-premise VoIP system without useable off-premise mobility options (Allworx).
- A cloud-based customer service call system for the hotlines (Amazon Connect)
- Verizon cellphones issued to staff working from home or from the field.
- Microsoft Teams without phone system licensing (used extensively by staff for meetings)

The scope of services to be provided includes, but is not limited to, providing basic telephone services to 125 employees, interns, and volunteers in 7 locations using physical desktop phones, Windows 10 desktop application, and iPhone and Android smartphones.

The goal of this project is to fully replace Legal Aid's current, on-premise Allworx phone system, as well as our cloud-based call center solution. Calls to Legal Aid currently come in either to

centralized intake unit staff, or directly to a local telephone number for each office. Staff in all offices have personal DIDs as well.

Legal Aid seeks a system that will provide a high level of detail regarding call analytics. Call data will be used to evaluate volume, timing and completion rates for the purposes of scheduling staff, managing call capacity, and promotion of our services.

## **Project Timeline**

Legal Aid requests that all interested parties submit a proposal by July 19, 2021 via email to [jfager@legalaidthefnebraska.org](mailto:jfager@legalaidthefnebraska.org).

Proposals will be reviewed with a target date of July 30, 2021 for selection of the vendor.

The selected provider will be notified by August 6<sup>th</sup>, 2021 and should be available to begin work immediately.

## **Proposal Requirements**

Vendors must guarantee they can provide the following services, functionality, and technical features:

### **Technical Scope**

- Vendor must provide failover and redundancy to ensure uptime and availability of the telecommunication system. Legal Aid cannot be without phones due to a server at the vendor going down, an outage at the vendor's hosting site, or any other issue affecting service from the vendor's premises.
- 100 licenses for staff that include DID, voicemail, texting and faxing capability
- 35 licenses for volunteers, conference rooms (ie. dialtone for outbound calling only)
- 135 basic, three-line appearance desk-sets
- 25 cordless hands-free headsets (DECT or Bluetooth)
- Softphone solution for full phone service functionality on Windows computers, including full call center ACD queue call handling functionality.
- No limitation on number of auto-attendants or the depth they can be nested and connected together.
- IVR navigation of auto-attendants via either DTMF tones or voice response, with ability to route calls, utilize hunt/ring groups, record on-hold special announcements/messaging, text to speech in both English and Spanish

- Voicemail for individual users as well as 'generic' shared voicemail boxes that calls can be routed to from the IVR and call center queueing system.
- Voicemail system must support voicemail-to-email and must support audio transcription.
- SMS messaging support
- Mobile application for Apple IOS and Android devices
- Unlimited calling/texting/faxing in the US
- Unlimited local calling
- Long-distance calling, preferably unlimited.
- Toll-free inbound calling plan for approximately 5,000 minutes per month
- On-demand voice recording capability
- Designated users must be able to easily adjust phone system working hours in case of emergencies, holidays, or inclement weather
- Call logging and exporting capability for management
- Softphones should work both on-premise and in the field without complex configuration and setup by end users or end user networks. (e.g., users should only need to download an app from an app store and enter a username and password. They should not have to download and configure a separate VPN app and/or enter extensive server details to achieve connectivity).
- The system must pass correct calling line ID number for inbound calls, including calls handled via 'follow me' features.
- Every user should have their own inbound DID, but outbound calling ID should be configurable administratively for offices, projects, and call center queue operations.
- Voice content of VOIP traffic should be encrypted via SRTP or other secure protocol. Voice traffic should not be transferred via unencrypted RTP.
- Call/Contact Center functionality with analytics; multiple call queues; agent login/logout; real-time monitoring; administrator dashboard; whisper/barge/listen; automated call reporting; call flow; queued automatic callback; call recording; wrap up time; and customer experience surveys.
- Integration with Microsoft Teams if possible is highly desirable.
- Support for integration with third-party CRM / case management systems via generic webhook methods for screenpops.
- Click-to-dial browser plugins for Chrome, Firefox and Edge

### **Technical Support Expectations**

Vendor shall provide adequate training to Legal Aid staff that includes the following:

- All users
  - Live training (on-site and/or remote)

- On-demand training modules
- Administrators
  - Live training (on-site and/or remote)
  - On-demand training modules for all features and functions, including reporting, analytics, queue management, whisper/barge/listen, dashboard management
- Detailed user manuals, installation guides, reference guides and configuration assistance.
- Standard business hours as well as after-hours and weekend remote technical support for high priority issues.

### **Customer Service**

Respondents must provide the following:

- Customer service representatives that will be able to assist during regular business hours for emergency and non-emergency issues.
- Engineering should be available to render assistance to IT department and sub-contractors during installation and initial configuration.
- Ongoing customer service support.

### **Submission Requirements**

All responses should be concise and well-organized, and demonstrate how your proposed services, approach and methodology, experience, and terms meet or exceed Legal Aid's requirements. If a Vendor is unable to provide all the required technical services and hardware, two or more Vendors may submit a joint proposal. Please ensure that a joint response contains a bid total and an itemized breakdown for each service or hardware provided by each Vendor. All proposals must also contain the following for each vendor:

#### **Vendor Information**

- Vendor's full name, address, telephone number, email, and website.
- Your submission point-person. Please include title, phone number, and email address.
- Company overview, including a brief history, mission, number of employees, and number of years in operation.
- Three (3) recent references concerning your experience with the work described in this RFP. Indicate the reference's name, a brief description of the services provided, and the name, title, telephone number and email address of a reference who is knowledgeable about your work and who may be contacted by our evaluators.

## Pricing and Pricing Methodology

- Pricing should be itemized and include a written explanation of all fees and costs.
- Pricing should include monthly recurring fees and total installation and on-boarding costs, as well as a written explanation of all fees and costs.
  - Unlimited local calling
  - An allowance for long distance calling
  - Rates for in-bound toll-free calls
  - Taxes and surcharges
- Pricing should include the length of the term for the quoted rates and renewal options
- Expected annual maintenance costs for software and hardware, itemized.
- Recurring monthly bills must include consolidated and itemized charges.
- Provide a description of how price changes and notifications would be handled.
- Proposals should clearly identify on-going costs.
- Pricing must include all overhead and travel costs needed to complete the work in the proposal.

## Other Information

Applicant is encouraged to provide other information or material that it believes is relevant to Legal Aid's evaluation or that provides additional features or value to Legal Aid.

Some examples of additional value may be:

- Experience with and ability to provide documentation for LSC grant reporting requirements.
- Abilities or accomplishments in user experience assessment, testing, and design.
- User cases highlighting the successful and timely implementation of critical, complex projects.

## Preferred Method of Contact

Please submit your proposal via email to [jfager@legalaidofnebraska.org](mailto:jfager@legalaidofnebraska.org). As the proposal process progresses, we will make ourselves available for phone calls and possible in-person meetings. Please submit questions relating to this RFP by email to Jeff Fager at [jfager@legalaidofnebraska.org](mailto:jfager@legalaidofnebraska.org).

RFP Opens: June 18, 2021.

Deadline for Responses: July 19, 2021.

Legal Aid will not pay any contractor costs associated with preparing responses or proposals submitted in response to this RFP.

Due to time constraints of the project, respondents must be prepared to start immediately upon selection.

Project completion, including testing, roll out, evaluation, issue management, and final adjustments and reporting must occur no later than October 29, 2021.

## **Evaluation**

The contract will be awarded to the vendor who provides the best value – the most advantageous balance of price, quality, performance, and features – to Legal Aid. Proposals will be presented to our primary funding organization, Legal Services Corporation, in accordance with their Office of Compliance and Enforcement. 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 Legal Aid's need, and is consistent with other parts of the proposal.
- Quality
  - Qualifications and experience of company
  - Technical expertise and approach
  - Level of response detail
- Performance
- Capacity, including open API for potential communication with other systems
- Understanding of and ability to meet Legal Aid's needs
- Responsiveness to Legal Aid
- Professionalism
- Quality of references
- Reputation for excellence in price, performance, quality, and service
- Willingness to accept Legal Aid and Legal Services Corporation terms

## **Legal Aid of Nebraska Rights:**

Legal Aid reserves the right to:

- Accept or reject any or all responses, or any part thereof;

- Waive any informalities or technicalities contained in any response 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/or
- Invite some, all, or none of the respondents for interviews, demonstrations, presentations and further discussion.