



# California Indian Legal Services

## Request for Proposal Intake Assessment

Issue date: February 18, 2025

Due date: March 18, 2025 @ 5:00PM PDT

### 1. Invitation

California Indian Legal Services (“CILS”) invites proposals from qualified consultants or firms to conduct a comprehensive assessment of its current intake processes and provide a roadmap of improvements to streamline workflows, reduce wait times, and enhance client satisfaction.

### 2. Introduction

CILS is seeking proposals for a contractor who will collaborate with staff and CILS vendors to conduct a comprehensive assessment of current intake processes, identifying opportunities to streamline workflows, reduce client wait times, and enhance overall satisfaction. Recommendations should encompass the development of a centralized intake system supported by modern workflows, policies, and technologies, including the implementation of a VOIP phone system and a centralized repository for intake resources to ensure consistency and improve staff allocation. Furthermore, the contractor’s recommendations should include options for launching an online intake system integrated with LegalServer, incorporating AI-supported callback scheduling to improve accessibility for legal service applications. Finally, recommendations should address specific integrations between LegalServer and other tools, leveraging API connections to enable automated referrals to external resources and partners. These enhancements aim to modernize the intake process, optimize resource utilization, and deliver a seamless client experience.

### 3. About CILS

California Indian Legal Services is one of the oldest not-for-profit law firms in the country that is devoted exclusively to the cause of Native American rights in California.

Governed by a Board of Trustees and endorsed by California tribes and tribal organizations, CILS has provided free and low-cost legal services to California tribes, tribal organizations, and Native American individuals throughout the State since 1967.

CILS maintains four offices throughout California and is supported by grants from Legal Services Corporation, Department of Justice, State Bar of California, private foundations, and individual and

corporate contributors as well as contract from a host of California's 109 federally recognized Indian Tribes.

CILS has a staff of 35 employees working out of 4 regional field offices. The field offices serve clients in urban and remote rural settings. The Principal Office (Headquarters) is housed in the Sacramento, CA field office location. Go to [www.calindian.org](http://www.calindian.org) for more information.

CILS is in a period of modernizing and automating many of its administrative operations with the vision to grow and expand access to services for clients throughout the state.

## 4. Project Objectives and Scope of Work

### Project Objectives

The contractor will collaborate with CILS staff and vendors to:

1. Conduct a thorough assessment of existing intake processes.
2. Provide actionable recommendations for process improvements and technology enhancements.
3. Develop a roadmap for implementing a centralized intake system, online intake platform, and integration strategies.

### Scope of Work

1. Assessment of Current Intake Processes:
  - Collaborate with staff and vendors to analyze intake workflows across all CILS offices.
  - Conduct surveys, interviews, and focus groups with staff and clients to gather qualitative and quantitative insights.
  - Identify inefficiencies, bottlenecks, and areas for improvement.
2. Development of Centralized Intake System Recommendations:
  - Design a centralized intake system supported by modern workflows, policies, and technologies.
  - Propose the implementation of a VOIP phone system to enhance communication and intake efficiency.
  - Recommend a centralized repository for intake resources and documentation to improve consistency and staff allocation.
3. Online Intake System Proposal:
  - Provide recommendations for launching an online intake system integrated with LegalServer.
  - Incorporate AI-supported callback scheduling to improve accessibility and client engagement.
  - Ensure the system is user-friendly, accessible, and aligned with LegalServer capabilities.
4. Integration Plan for LegalServer and Other Tools:
  - Identify specific integration needs between LegalServer and external tools.
  - Propose API connections for automated referrals to external resources and partners.
  - Recommend strategies for seamless integration and scalability.
5. Regular Collaboration with CILS Leadership:
  - Meet weekly and/or monthly, and as needed, with the CILS Director of Compliance and Legal Technology to:
    - Review project progress.
    - Address challenges and align objectives.
    - Finalize deliverables and implementation strategies.

## 5. Project Deliverables

The following are the conditions of project deliverables under this contract:

- All recommendations identified during this engagement will be documented and reviewed with CILS management.
- All deliverables produced are for the sole use of CILS.
- All work papers, analyses and final reports are the property of CILS and may not be distributed or released to others without prior written consent of CILS.

The Project Deliverables will include the following:

1. Comprehensive assessment report of current intake processes.
2. Workflow documentation and process maps.
3. Recommendations for a centralized intake system, including a VOIP phone system and resource repository.
4. Proposal for an online intake system integrated with LegalServer, featuring AI-supported callback scheduling.
5. Integration plan for LegalServer and external tools with API specifications.
6. Final report summarizing findings, recommendations, and an implementation roadmap.
7. A presentation to the CILS internal project team once the Intake assessment report is completed (presentation may be online) and to the CILS Board of Directors if deemed necessary.

## 6. Proposal Content

### 6.1 Description of Responder:

Provide the following:

- a. Responder's full legal name;
- b. Responder's head office mailing (for billing) and website address;
- c. Name, telephone number, email address of the responder's designated contact person;
- d. Expertise of the responder, including the core focus of services provided by the responder;
- e. Identify the names of principal staff and key personnel who will provide the services.
  - Submit resumes or qualifications for each key staff person, summarizing their experience and expertise.
  - Describe each person's role and responsibility with the project.
  - Any substitutions of staff after the award of the contract will require the approval of CILS.
- f. Signature of an officer or other person who is legally authorized to bind the applicant to the proposal cost and schedule.
- g. The name, title, address and contact information of three references for clients who you have provided the same or similar services. Provide information on the actual services provided and length of time services were provided to client. Nonprofit reference, specifically related to organization providing legal services are preferred.

### 6.2 Understanding of Project:

Provide a description of:

- a. A brief statement of your understanding of the services to be performed.
- b. Your approach and methodology for providing these services.
- c. How your organization is positioned to provide and a history of the experience providing similar services. Explain any history you have working with legal services organizations, including knowledge of resources available to nonprofits.

### **6.3 Pricing**

Total proposed project cost itemized as appropriate.

## **7. Proposal Assessment Process and Criteria**

All proposals will be evaluated by CILS. Notwithstanding any other provision in the RFP, CILS reserves the right to accept the proposal that it deems in its sole discretion most advantageous and the right to reject any or all proposals without giving any notice or reasons. The proposal having the lowest cost to CILS will not necessarily be accepted.

## **8. Cost of Proposal**

The available budget for the Contractor is \$20,000.

The Contractor shall bear all costs associated with any proposal meeting(s), interview(S), or preparation and submission of the bid and CILS shall not be responsible or liable for any costs, regardless of the conduct or outcome of the solicitation and request for quotations.

## **9. Proposal Evaluation Criteria**

CILS may consider any criteria it desires, including, without limitation, those listed below (not necessarily in order of importance):

- a. Demonstrated understanding of the project objectives, scope, requirements.
- b. Professional qualifications, reputation, capability, and experience.
- c. Ability to address technical, functional and business requirements.
- d. Cost of the project.
- e. Quality of the proposal.

The successful contractor may be asked to participate in negotiations and may be asked to revise their proposal based on the negotiations. In submitting a quotation, each contractor acknowledges that they have read and understand these requirements.

## **10. Timelines and Milestone Dates**

- Request for Proposals issued: 2/18/2025
- Request for Proposals due: 3/18/2025 by 5:00PM PDT
- Projected Award date: 04/01/2025
- Contract Date: 04/01/2025- 04/07/2025
- Project Start Date: 04/07/2025
- Desired completion date: 11/17/2025

## **11. Contacts, Inquiries, Clarifications and Submission**

Please send completed proposals and all inquiries/questions regarding this RFP via email to:

Veronika Brown  
Direction of Compliance and Legal Technology  
[rfp@calindian.org](mailto:rfp@calindian.org)

***CILS will only accept submissions as attachments to an email.***