



**Request for Proposal:
Colorado Legal Services – Coordinated Statewide Intake
Business Process Analysis**

GOAL

Colorado Legal Services (CLS) seeks to identify opportunities to increase efficiency, precision, consistency, and improve applicant and staff experience within our Coordinated Statewide Intake System (CSI). Our goal is to obtain recommendations which will help CLS redesign a more efficient, accurate intake process that quickly and effectively serves applicants and is easier for staff to navigate and manage.

About Colorado Legal Services

Colorado Legal Services is Colorado’s statewide nonprofit legal aid program, with thirteen offices providing civil legal assistance to low-income Coloradans throughout the state. CLS provides free legal assistance in a broad variety of legal areas, including family law, public benefits, eviction defense, consumer protection, services to survivors of crime and human trafficking, and many others.

CLS has strengthened lives, assisted families, and supported communities—one person at a time for almost 100 years. We are committed to providing high-quality, free legal advice and representation to eligible individuals throughout Colorado. We have a long history of successful impact and advocacy. CLS strives to bring about substantive, transformational change in the lives of those we serve.

Project Description

The project is to conduct a business process improvement analysis of Colorado Legal Service’s Coordinated Statewide Intake process from all points of applicant entry through the intake process to identify opportunities to increase efficiency, accuracy, and consistency, thereby improving the applicant, client, and staff experience. The intake process will be mapped and evaluated for its efficiency, effectiveness, and applicant experience.

The consultant will conduct interviews with CSI staff regarding processes and workflows and will review technologies used to complete those tasks. They will interview and shadow CSI staff from all job classifications (remotely and/or in person) in order to identify the strengths and growth areas involved in statewide intake.

The consultant will also interview applicants who applied through the online intake application, as walk ins, and via phone to gather information regarding their application experience. The consultant will compile and analyze information regarding applicant interviews and will integrate that feedback into their recommendations.

Further, it is anticipated that key stakeholders will be interviewed, not only to evaluate how the current intake process works, but also to identify the needs of all stakeholders and what improvements they would recommend.

The consultant will then draft a report including an analysis of data acquired through the research and discovery process outlined above, will identify both strength and growth areas in the intake processes, and will provide recommendations about how to improve the applicant experience, and CSI processes overall. The consultant will identify the ways CLS can better leverage innovative technologies to streamline and improve the intake process. The findings and recommended improvements will be conducted through the lens of justice, equity, diversity, and inclusion, while also focusing on data security including confidentiality and best practices for data capture and retention.

CLS will use data from the analysis and final report to determine how we can improve our CSI applicant experience, and staff workflows. The final report will include an analysis of the existing intake system, a process map, a gap analysis, a recommended process redesign, a cost analysis, prioritization of and estimated timeframes for recommended improvements, and next steps required for implementation. This will have an overall positive effect regarding transforming program service delivery.

Findings, including an intake improvement plan with recommendations about processes and workflows, with an emphasis on improvements that can be made using cutting-edge technologies will be presented to the CLS project team and Colorado Legal Services senior leadership team.

Colorado Legal Services anticipates this project will take approximately ten (10) months, from January through October 2025.

The maximum amount of payment for all work performed for the project is \$25,000.

Required Qualifications

- Experience providing professional and thorough intake business process analysis and findings to legal aid organizations.
- In-depth knowledge regarding innovation technologies and how to leverage them to improve CLS' CSI intake
- Experience with telephone systems, call flows and online intake.
- An understanding of organizational process flow and tools, and experience successfully implementing organization procedures and organizational change.
- The ability to think deeply about organizational process flow and create actionable plans and tools that can be implemented to achieve concrete success in meeting intake process mapping goals.
- Experience with the Legal Server case management system preferred.

Desired Deliverables

- Comprehensive review and documentation of Colorado Legal Service’s current CSI applicant intake, transfer and client acceptance processes, including review of all current intake portals, transfer processes, workflow, and Colorado Legal Service’s case acceptance standards (CAS’s) for process only.
- Evaluate the efficiency and effectiveness of each process and identify gaps and needed improvements.
- Evaluate CLS CAS’s to identify areas of improvement for an efficient and effective flow of applicants from intake to acceptance as a client.
- Create a final report that includes a review of Colorado Legal Service’s current intake, transfer and client acceptance process as well as an evaluation of each process.
 - The final report will include an analysis of the existing intake system, a process map, a gap analysis, a recommended process redesign, a cost analysis, a description of how technology can be used to improve CSI processes, prioritization of and estimated timeframes for recommended improvements, and next steps required for implementation.

This report should include recommendations regarding areas of improvement and opportunities to transform CLS’s CSI intake system to make it more efficient and effective.

Estimated Project Timeline

RFP released: Nov. 19, 2024

Bids due: December 13, 2024

Interview and selection process: December 2024-early January 2025

Work begins mid to late January 2025

How to Apply

Please send RFP responses and inquiries to slipka@colgalserv.org with the subject line “Colorado Legal Services CSI Intake BPA” by December 13, 2024

Response Requirements

- Describe you/your firm’s capabilities. Specifically, include your experience working with nonprofits, legal aid organizations and/or law firms, and your ability to provide each of the above Desired Deliverables.
- Description of recommendations made to past or current clients regarding how technology can be used to improve processes and workflows
- Sample documents and presentations from previous similar projects, such as stakeholder interviewer summaries or final recommendations documents.
- Project outline, including milestones and timelines.
- Line-item budget proposal with detailed information about what expenses will be covered under each cost, and any variable expenses.

- List the principal consultants who will work directly on each component of this project, as well as their qualifications.
- Provide a client list, highlighting any successful intake process mapping work.
- Include any additional information you deem pertinent to consultant selection.
- Provide three references.