



**REQUEST FOR PROPOSAL**  
**INTAKE BUSINESS PROCESS ANALYSIS/IMPROVEMENT PROJECT WITH ADDITIONAL**  
**COHORT PROGRAM COORDINATION MANAGEMENT**

**Proposal Due Date:** May 28, 2024

**Contact:** Cynthia Sadkin, Chief Strategy Officer

[csadkin@legalaidchicago.org](mailto:csadkin@legalaidchicago.org); 312.347.8346

**Introduction:** Legal Aid Chicago seeks a consultant to conduct a business process analysis and recommend improvements to make client intake processes and experiences more streamlined, efficient, equitable, and effective. In addition, the selected consultant will be responsible for leading a cohort of 4 Legal Services Corporation (LSC)-funded programs each engaged in similar BPA projects to identify and draft a common set of recommendations for potential replication by other LSC-funded programs around the country. This project is funded by an LSC Technology Improvement Project grant. The consulting budget remaining in the project is \$85,500 (includes \$47,500 for Legal Aid Chicago BPA and \$38,000 for cohort program coordination).

**Organizational Overview:** Legal Aid Chicago is one of the largest legal aid agencies in the Midwest, providing civil legal services to low-income and otherwise vulnerable people in Chicago and suburban Cook County, as well as statewide for Migrant Legal Services and Human Trafficking Survivors. Our team of more than 225 includes lawyers, paralegals, intake specialists, social workers, ombudsman, and support staff who dedicate their time to protecting the fundamental rights of vulnerable people navigating the legal system. Our mission is to achieve equal justice through advocacy, education, collaboration with community groups, and most notably, litigation. We have a centralized Client Screening Unit and specialized Practice Groups which focus on key areas of poverty law: Consumer, Children & Families, Housing, Immigrant and Workers' Rights, Public Benefits, Criminal Records Relief, Medical-Legal Partnerships, and Long-Term Care. Our advocacy services also include Pro Bono & Community Partnerships and Client Support Services (social work).

**Project Description:** Legal Aid Chicago handles more than 10,000 legal cases annually, ranging from advice and brief services to extended representation in court and administrative proceedings. Our centralized Client Screening Unit (CSU) was created in 2009. Over time, as our agency has grown and our work has become more complex, alternate intake access points have proliferated across the organization and our current format is a patchwork of

phone numbers, online portals, help desks, clinics, outposts, and referrals from community organizations.

We receive approximately 50,000 calls to our main intake phone line each year, and 35,000 of those callers (70%) get far enough in the system to choose their legal issue on an automated phone menu. However, our dedicated intake staff are only able to handle around 8,500 calls (24%), with the remaining calls screened out through a phone menu triage system that diverts callers to other sources of assistance. An additional 3,500 intake calls are handled by staff outside of the main phone line, including direct referrals from service providers and community partners. We also handle 1,500 online intakes and over 500 clients are served through outreach programs each year.

With a consultant, we will undertake a Business Process Analysis/Improvement project (BPA) to analyze all of our intake pathways and to make recommendations to ensure efficiency and equity in access across all our services. We will determine whether we should integrate any of our alternate intake programs into our centralized screening system, and if so, how to do it. We will also determine when the benefits to maintaining specialized screening pathways outweigh potential efficiencies to centralization, and whether there are any effective screening practices being utilized in some of our intake programs that could be adopted elsewhere within the organization. Finally, we will ensure that our intake pathways are accessible and that our processes are transparent to all those seeking our services.

The scope of the project will include collecting quantitative and qualitative data about each of our intake access points, including phone (centralized system and specialized intake lines and voicemails), online, in-person (clinics, help desks, walk-ins, outreach intake), and referrals from community partners (email, phone, online). Metrics for certain aspects of each intake will be set and used to compare efficiencies and quality among the different types of intake. For example, we should determine if there are differences in contact rates, rejects vs. accepts, and advice vs. extended service, depending on which intake path the applicant comes through. The BPA consultant will work with us to decide which metrics would be most helpful to conduct an objective evaluation of each intake path. The project is expected to include documentation of the current state, recommendations for improvement and path to implementation, and a separate set of combined recommendations from the coordination meetings with the cohort programs.

**Project Expectations and Deliverables:**

- Collaborative project management with Legal Aid Chicago’s Chief Strategy Officer
- Comprehensive collection and documentation of quantitative and qualitative data from all intake access points and processes
- Professional mapping of all intake processes

- Note: preliminary maps have been created by intake staff throughout the organization, but they have not been turned into electronic maps, and guidance is needed to fill in additional details
- Interviews and surveys of internal and some external stakeholders to evaluate how the current processes work, identify pain points, and gather information not easily interpreted by reviewing data and reports
- Preliminary and iterative (based on feedback) analysis to document current state and draft recommendations to improve Legal Aid Chicago's intake processes
- Draft and deliver a final report which includes documentation of the current state, recommendations for improvement (including proposed workflow diagrams and suggested staffing), and an action plan for future implementation
- In a parallel workstream with Legal Aid Chicago's BPA, lead cohort coordination with 4-5 LSC-funded programs which are all conducting similar Intake BPA projects (Land of Lincoln Legal Aid (central/southern Illinois), Bay Area Legal Services (Tampa, FL), Volunteer Lawyers' Project (Boston, MA))
- Run monthly project coordination meetings to identify commonalities and share learnings from each program over the course of the project; draft associated status reports
- Create a report of consolidated recommendations based on the work and findings of all cohort projects which will be delivered to LSC's Technology Initiative Grants team at the conclusion of the grant period, April 30, 2025
- Provide additional consulting hours to any of the cohort projects on an as-needed basis (budget should include limited set-aside hours toward this support)
- Consultant must sign a confidentiality agreement with Legal Aid Chicago to protect all client and organizational information from unauthorized disclosure

**Timeline:**

- RFP release date: expected May 2, 2024
- Informal Q&A window (via email to [csadkin@legalaidchicago.org](mailto:csadkin@legalaidchicago.org)): May 2-May 15, 2024
- Proposal submission deadline: May 28, 2024
- Contractor selection: approximately June 7, 2024
- Commencement of work to begin as soon as possible after contract signed and approved by LSC
- All phases of work must be completed by April 30, 2025. The preferred timeline for Legal Aid Chicago's internal BPA is completion by January 31, 2025, with a final report for the coordination component of the project to be complete by April 30, 2025.

**Qualifications:**

- Experience providing intake business process analysis to legal aid organizations, and a professional reputation of having successfully implemented the same
- Experience with telephone systems, call flows, case management systems, 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 LegalServer case management system preferred

**Proposal Requirements:**

- Must be in writing in pdf format and submitted by email to [csadkin@legalaidchicago.org](mailto:csadkin@legalaidchicago.org)  
Please put "Intake BPA Proposal" in the subject line
- Detailed Proposal (no more than 10 pages), including:
  - Introduction or Summary of Project
  - Proposed approach, objectives, tasks
  - Proposed plan for communicating with internal project lead and tracking project progress
  - Proposed schedule/timeline with milestones
- Proposed Budget and Cost Projections, including:
  - Expected hours and costs for each phase of the project, distinguishing between Legal Aid Chicago-specific work and coordination work with cohort LSC-funded programs
  - Any expected costs/fees outside of hourly rates
  - Travel budget (if needed - not expected)

Note: A small amount of our original budget has already been spent. The remaining funds for consulting services are \$85,500 (\$47,500 for Legal Aid Chicago BPA and \$38,000 for cohort program coordination). Budgets exceeding this limit will not be considered.

- Background and relevant experience of the company and, if applicable, the specific team member(s) who would be the lead consultants for this project
- Contact information for 2 professional references
- Any other materials that would be informative regarding past performance and qualifications for the project, such as samples of deliverables from similar projects

**Selection Criteria:**

The following criteria will be used to evaluate submitted proposals:

- Consultant possesses knowledge, experience, and expertise in the planning, project management, and execution of services required for the project
- Demonstrated successful and timely completion of similar projects to the one described in this RFP
- Realistic and reasonable breakdown of associated project tasks, timeline and costs
- Clear communication in writing and orally
- Positive and trustworthy references
- Ideally, past experience working with LSC-funded organizations

**Additional Information:**

- All costs associated with responding to this RFP are the sole responsibility of the respondent
- All submitted materials become the property of Legal Aid Chicago and will not be returned
- Specific terms and conditions of contract to be determined after conditional offer is made by Legal Aid Chicago and accepted by the selected consultant.