Request for Proposals for Intake Assessment

ISSUED BY

Inland Counties Legal Services
1040 Iowa Ave., Suite 109
Riverside, CA 92507

QUESTIONS DUE

Tuesday, November 3, 2026

PROPOSAL DUE

Tuesday, November 10, 2026

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1. Description, Purpose, and Objectives

The purpose of this Request for Proposal (RFP) is to request bids to conduct a process analysis of our intake system. The evaluation should assess our current technology and workflows of our various intake portals: telephone hotline, walk-ins to regional offices, online intake, partner referrals, and offsite clinics. The final evaluation report should include analysis of the existing intake system, a process map, a gap analysis, a recommended process redesign, and next steps for implementation.

2. Organization Overview

Inland Counties Legal Services (ICLS) is dedicated to meeting the civil legal needs of low-income people throughout San Bernardino and Riverside counties. We help with a wide range of legal issues including immigration, elder law services, family law, health, housing, access to benefits, special education, and consumer issues. We offer a full range of legal assistance, including information and referrals, counsel and advice, workshops, clinics, and direct legal representation.

3. Current Intake Phone System Description

ICLS's primary method of intake is through hotlines that are directed to our Intake Unit (IU). The IU provides same day provides intake services to eligible clients who met organizational priorities with and sets up appointments with legal advocates so that they may receive direct representation, if available. The IU does an eligibility assessment, which includes questions as to the applicant's income status, citizenship status, and a legal assessment. The IU also had an online web application that feeds into LegalServer, ICLS's case management system. Other methods of accepting applications include partner referrals, off-site clinics, and walk-ins to regional offices.

ICLS has 2 toll-free numbers in the IU. One is for low-income clients and is open from 8:45AM-4:45PM from Monday to Friday. The other number is for senior clients and is open Monday through Friday from 8:45AM to 4:45PM (all times are Pacific). Online intake is done through our website, and those applications are processed between calls by IU staff. Walk-ins receive the same intake as our callers, but it is done in person. The number of daily applicants on our hotline and online intake far exceeds the number we can process, leading to long wait times, delays in service, and client and staff frustration. This is one of the primary reasons we are seeking to evaluate our current process.

Our IU unit is overseen by the Deputy Director of Operations, and directly managed by an Intake Supervisor. The IU employs ten Intake Specialists to handle all calls. Legal advocates and legal administrative assistants also conduct intakes.

ICLS uses LegalServer as our case management system and RingCentral for our call center. We also use Microsoft Teams.

4. Project Description

ICLS is seeking a consultant to conduct a process analysis of our procedures for intake and referrals by our Intake Unit. The evaluation will serve as a base line to assess future improvements. ICLS will use the evaluation to determine how we can improve our client experience, staff workflows, and program efficiency. The evaluation and recommended improvements should be conducted through the lens of Diversity, equity, inclusion and belonging.

5. Project Deliverables & Timeline

Deliverables:

a. Project plan

b. Documentation of review of current workflows and technology

c. Documentation of interviews and surveys with staff

d. Description of IU staff user testing and results

e. Description of client experience testing and results

f. Process map

g. Gap analysis report

h. Recommended process redesign and implementation next steps

Timeline of Deliverables:

Timeline for deliverables to be discussed, however, all work must be completed by 3/1/2027.

6. Proposal Dates & Timeline

Event	Date	Time
Request for Proposal Released	10/26/2026	N/A
Final Questions Due	11/03/2026	Before 12:00 p.m.
Responses to Questions Released	11/06/2026	Before 3:00 p.m.
Proposals Due	**11/10/2026**	**Before 5:00 p.m.**

Proposals are open from October 26, 2026, through November 10, 2026. A vendor will be recommended, and notified of recommendation by November 20, 2026. Thereafter, ICLS must submit the proposed scope of work to LSC for prior approval, and approval granted before the agreement can be entered into and work commencing.

ICLS must get prior approval from the Legal Services Corporation (LSC). This process can take up to ninety (90) days. Once approval is received, ICLS will notify the successful vendor to begin services.

7. Timeline of Deliverables

The timeline for deliverables is to be discussed upon bid award. However, all work must be completed by 3/01/2027.

8. Project Budget

The budget for this project is $35,000. Please describe in detail the fee structure you propose for providing evaluation services. All costs associated with responding to this RFP are the sole responsibility of the responding consultant. Submitted responses to this RFP have become the property of ICLS. ICLS reserves the right to use all ideas included in any response without incurring any obligations to the responding consultant or committing to procurement of the proposed services.

9. Format for Proposals (Response Requirements)

All proposals must adhere to the format below. The proposal should be organized in the following manner with the subject headings and sequence indicated.

1. Vendor's name, address, telephone number, email and a description of the vendor's legal status, e.g., corporation, sole proprietor, etc.

2. A statement that guarantees that the response constitutes a firm offer valid for ninety (90) days following receipt and that ICLS may accept the offer any time within the 90-day period

3. References. As part of the evaluation process, ICLS reserves the right to contact client references submitted. References may be used to assess the proposers' past performance, project management capabilities, communication standards, and overall success in delivering services.

4. Detailed timeline for the project, Project Budget Estimates and Cost Projections including:

    - Provide a breakdown of all costs associated with the project.
    - Identify any additional expenses, reoccurring fees, etc., that you will require to provide services.
    - Provide pricing, hourly rates and other fees.

5. Proposed Solution based on description of services
6. Pricing and Hourly Rates

10. Selection Criteria

The successful consultant will be chosen through a qualitative review of these factors. The following criteria will be used to evaluate proposals received:

- Consultant should possess knowledge, expertise and experience in the planning, project management, and execution of the services for which they are responding.
- Experience and past performance.
- Capability of proposed solution.
- Cost of services provided.

The consultant will be selected solely by the judgment of ICLS. The final decision is the sole decision of ICLS and the respondents to the RFP have no appeal rights or procedures guaranteed to them. Consultant(s) selected will be evaluated in part on the ability to deliver products on time and within budget, and their demonstrated understanding of the solution required based on their responses and subsequent interviews.

11. Evaluation Process

Deadline for questions regarding this service is November 3, 2026. Responses to inquiries that substantially or materially change the RFP will be made available to all prospective consultants.

Please email inquiries to the following:

- tsolorzano@icls.org

We will respond within a 72-hour period. The selected vendor will be expected to contract with ICLS. A fully executed contract must be signed and submitted to Inland Counites Legal Services within ten (10) days of the bid award being issued and prior approval by LSC granted.

Evaluation Criteria:

A. Identification and Documentation of Current Processes: Thoroughly document current intake and case handling procedures.
B. Efficiency Assessment: Evaluate the efficiency of existing processes, identifying bottlenecks and redundancies.
C. Interviews and/or surveys with intake staff and unit staff on what is working and areas of concern.
D. Description of IU user testing, conducting user testing, and results of user testing.
E. Description of client experience testing, conducting client testing, and results of client testing.
F. Recommendations for Optimization: Suggest improvements and best practices tailored to our specific needs including the possibilities of utilizing AI to assist in the intake process.
G. Implementation Roadmap: Provide a clear and feasible roadmap for the implementation of recommended changes.

H. ICLS staff will assist the consultant with sending out surveys, coordinating interviews, and providing necessary data for the evaluation.

Following receipt and review of the proposals selected consultant(s) may be invited to an interview at ICLS's sole discretion based on evaluation of each respondent's proposal. ICLS reserves the right to reject all responses, and to waive any irregularities of information in the evaluation process. Vendors whose responses are not chosen for further negotiations or award will be notified via email.

DEADLINE: Proposals must be delivered via email to Tessie Solorzano at tsolorzano@icls.org no later than 5:00 p.m. on Tuesday, November 10, 2026. All proposals must include a statement of authorization to bid signed by a person who is authorized to enter contracts. Bidders must provide a statement that guarantees that the response constitutes a firm offer valid for ninety (90) days following receipt and that ICLS may accept the offer any time within the 90-day period.