

Project Name: LegalServer Workflow Improvement Project

Responses Due: March 30, 2026 at 5:00 PM

Community Legal Aid SoCal
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Purpose

The purpose of this Request for Proposal (RFP) is to request bids to improve legal service delivery and client experience by developing and implementing new LegalServer workflows that reduce client wait times, streamline intake, improve the ability of staff to more effectively utilize the case management system, and prepare CLA SoCal for integration into a pending regional system of coordinated intake with other legal aid organizations.

Organization Overview

Community Legal Aid SoCal (CLA SoCal) helps our neighbors fight injustice by providing compassionate, high quality legal aid and advocating for stronger communities. Our clients include residents of Orange and Southeast Los Angeles Counties whose human rights and basic needs are jeopardized, and for whom significant barriers to justice exist. Nearly all of those we serve are otherwise unable to afford or obtain legal counsel, including low-income individuals, individuals experiencing homelessness, seniors, and survivors of human trafficking, domestic violence, and discrimination.

CLA SoCal has adopted the organizational values of Accountability, Collaboration, Compassion, Equity, and Trust. These values are the core principles that characterize the way CLA SoCal approaches our work, our clients, the community, and each other. CLA SoCal seeks to engage in honest self-inspection and analysis of how we can better embody our values and partner within the organization and with our client community to promote and effectuate justice with a trauma-responsive approach.

CLA SoCal's History and Background

Bridging the justice gap since 1958, we were founded as Legal Aid Society of Orange County in direct response to the needs of Orange County's most vulnerable communities for equitable access to justice. Our priorities, practice areas, and programs have constantly evolved in response to the most pressing needs of underrepresented individuals and groups in Orange County and beyond. Our first large-scale effort to respond to the needs of a uniquely vulnerable population was launched in 1976, when we created the Senior Citizens Legal Advocacy Program.

In 1984, we identified a growing need for legal help outside of Orange County and successfully bid for a competitive grant to expand our service area beyond Orange County. We expanded our service area to include 18 cities in southeast Los Angeles County, where we became known as Community Legal Services of Southeast Los Angeles County. In 1995, our Complex Litigation Unit filed suit in state court against a local municipality for regulations targeting people experiencing homelessness and successfully protected the constitutional rights of these individuals. That same year we established a toll-free hotline for clients to increase accessibility of our services to a greater number of people. This hotline continues to operate as a centralized intake system for the program and serves as a gateway to all our services.

Thirty years ago, CLA SoCal staff developed “Matrix,” one of the first electronic case management systems utilized by an LSC-funded organization. In 2019, the organization shifted to LegalServer; today, staff use a highly customized version of the application to field 40,000-50,000 requests for assistance annually. In 2023, CLA SoCal’s Intake and Assessment Unit (IAU) worked with an LSC Technology Improvement Project-funded (TIP-) consultant to analyze intake operations; this work resulted in a thorough unit assessment that outlines several opportunities for improvement. The next year, CLA SoCal began work with four other legal aid organizations in Orange County to plan “JustOC,” a coordinated intake system to help clients more efficiently and effectively access civil legal aid. JustOC is midway through a 1-year planning phase that will be followed by implementation in 2027.

1. Short project description

CLA SoCal seeks to hire a consultant to assist with two components of our LegalServer workflow improvement project. The project is designed to reduce client wait times, improve client eligibility determinations, facilitate the transfer of eligible clients for additional legal services internally and externally, and help automate documentation and approval processes for compliance.

To accomplish these objectives, consultant will 1) work with CLA SoCal’s team to develop, implement, and evaluate 3-5 LegalServer workflows that will improve and monitor intake for clients and staff; and 2) consult on the readiness of our LegalServer system for inclusion in JustOC and develop both specific and replicable recommendations that will support integration of LegalServer into the project.

2. Project requirements and project objectives

The qualified consultant will:

- a. Work with CLA SoCal project team to **analyze and prioritize 3-5 LegalServer workflows** to improve by June 2027. Consultant will **lead development of implementation plan** that will present final workflows, provide a project management plan for bringing those workflows to fruition, and create metrics for success that include baseline data. Workflows will likely support CLA SoCal’s ability to tap into unused or underutilized LegalServer capabilities such as guided navigation, screen customization, integration with VOIP, and/or appointment setting.
- b. **Build, test, implement and monitor workflows** with an eye towards **building the internal capacity** of CLA SoCal technology staff to undertake similar projects in the future.

- c. **Document and develop staff procedures and training materials** for application of the new workflows. **Lead staff training and/or coach CLA SoCal staff** to lead trainings on use of new systems.
- d. Deliver an **IAU dashboard** to replace the current “Batting Order” Excel spreadsheet that tracks outstanding calls/online intake requests.
- e. **Consult with JustOC partners and consultants** to ensure that CLA SoCal’s case management system has the capabilities needed to move forward with coordinated intake.
- f. **Provide final reports** on 1) the efficacy of the workflows in supporting project objectives and meeting metrics, and 2) documenting recommendations for integrating LegalServer into a coordinated intake system.

3. Timeline of Deliverables

Project begins May 1, 2026 and concludes October 31, 2027. Please provide timeline with specific deliverables based on project requirements and objectives above.

4. Project budget: \$90,000

A line-item budget will be required from consultants invited to prepare Scope of Work. Contract must be approved by the Legal Services Corporation prior to execution.

5. 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:

- Consultants 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, including knowledge of LegalServer.
- Capability of proposed solution.
- Cost of services provided.

The consultant will be selected solely by the judgment of CLA SoCal. The final decision is the sole decision of CLA SoCal and the respondents to the RFP have no appeal rights or procedures guaranteed to them. Vendor(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.

6. Process

Following receipt and review of the proposals selected consultant(s) may be invited to an interview at CLA SoCal’s sole discretion based on evaluation of each respondent’s proposal. CLA SoCal reserves the right to reject any and all responses, and to waive any irregularities of information in the evaluation process. The selected consultant(s) will be given an opportunity to present their proposal in detail. Those directly responsible for the design of this project will be expected to attend. Although CLA SoCal may conduct interviews to select among the final candidates, it is not CLA SoCal’s intent to seek extensive clarification

of the proposals received. Therefore, it is to the benefit of the respondent to provide an explicit, detailed, and complete discussion of the work in the proposal.

The proposal should be organized in the following manner with the subject headings and sequence indicated.

- Introduction
- Experience and Past Performance
- Organization and Personnel
- Proposed Solution(s) - Based on Description of Services
- References
- Pricing, Hourly Rates and Other Fees

This RFP is available as a MS Word file. Please answer all questions in the format provided.

Any questions regarding this RFP must be submitted by e-mail to Stephanie Spilker at sspilker@clsocal.org at Community Legal Aid SoCal by **March 30, by 5:00 PM**. All questions will be answered promptly. Responses to inquiries that substantially or materially change the RFP will be made available to all prospective vendors.

Selection Process Schedule

The schedule of the selection process is as follows:

- Release of the RFP: March 11, 2026
- Vendor RFP Questions Due: March 17 by 5:00 PM
- RFP Responses Due: Monday, **March 30, by 5:00 PM**
- Invitation to selected consultants to participate in an interview: April 6, 2026
- Interviews: Week of April 13
- Notification of Selection Results: Week of April 24,
- Contract Start: May 25, 2026

7. Additional Information

All costs associated with responding to this RFP are the sole responsibility of the responding consultant.

Submitted responses to this RFP become the property of CLA SoCal. CLA SoCal reserves the right to use any and all ideas included in any response without incurring any obligations to the responding consultant or committing to procurement of the proposed services.