

REQUEST FOR PROPOSALS (RFP): Intake & Referral Modernization Project

GOAL

Land of Lincoln Legal Aid (Land of Lincoln) seeks proposals from qualified contractors to modernize and streamline our client intake and referral processes by implementing Guided Navigation within LegalServer, deploying a unified electronic referral system for community partners, redesigning our prescreen workflow, and supporting training and evaluation. The goal is to improve efficiency, accuracy, compliance, and applicant experience across our 65-county service area.

About Land of Lincoln

Organized in 1972, Land of Lincoln is a not-for-profit organization providing free civil legal assistance to low-income Illinoisans in 65 counties in central and southern Illinois through five regional offices, four satellite offices, and a centralized Legal Advice and Referral Center (LARC). We are the sole provider of a full range of civil legal services—from advice to representation—in our territory. Our mission is to provide low income and senior residents of central and southern Illinois with high quality civil legal services to obtain and maintain their basic human needs, including housing, foreclosure, public benefits, family, consumer, criminal records clearing, and education.

Project Description

The selected contractor will support Land of Lincoln in implementing two core innovations identified in our Technology Initiative Grant (TIG) and recent intake assessment in two phases: **Phase One** of the project will include (1) modifying our intake using Guided Navigation within LegalServer to enhance intake accuracy and efficiency—initially focusing on funding code assignment, legal problem code selection, prescreen redesign and other high-discretion intake areas; and (2) developing and launching a secure, mobile-friendly electronic referral form for community partners that integrates directly with LegalServer’s prescreen to enable standardized data capture and referral status tracking. (3) Develop and provide training on all new systems including updating our Intake Manual, including standard operating procedures and other relevant intake documentation. **Phase Two** of the project is an evaluation of the effectiveness of the Phase One project and implementation. This will include the development of standard operating procedures and KPIs for the continual evaluation of our intake system.

Qualifications

- Demonstrated experience implementing Guided Navigation or complex workflow automation in LegalServer for legal aid organizations.
- Expertise with LegalServer configuration, online intake modules/APIs, and data integrations.
- Experience designing secure, user-centered electronic forms and referral workflows for justice/community partners.
- Background in organizational process improvement, change management, and staff training.
- Strong project management capabilities; ability to deliver actionable tools, documentation, and training.
- Expertise in evaluating the effectiveness of project implementation and process as well as

Desired Deliverables

- Guided Navigation: Conduct review of Land of Lincoln current intake workflows and identify areas of improvement and key decision points for Guided Navigation. Design, build, pilot, and refine Guided Navigation pathways in LegalServer to support accurate assignment of funding and legal problem codes and other identified intake decision points.
- Unified Electronic Referral Form: Consult with Regional Offices and community partners to determine electronic referral form preferences. Design, test, and deploy a secure, mobile-friendly referral form for community partners that integrates with LegalServer's prescreen; configure automations for referral receipt notifications and status tracking.
- Prescreen Redesign: Streamline prescreen fields to essential eligibility/conflict checks; implement mandatory-use policy with accountability measures.
- Training & Documentation: Update Intake Manual and Intake Procedures; develop standardized intake scripts; create training modules and job aids; conduct trainings for staff and community partners.
- Evaluation & Final Report: Define KPIs (e.g., intake processing time, data accuracy, referral completion rates); develop reports in LegalServer for said KPIs; gather qualitative feedback; Conduct surveys and interviews with staff and community partners to assess usability and satisfaction; deliver a final evaluation report with recommendations.

Budget Guidance

Proposers should submit a detailed, line-item budget aligned to the following guidance derived from Land of Lincoln's Special Grants Detailed Budget not to exceed \$70,000 total (e.g., Consultant/Developer at ~\$50,000; Project Evaluator at ~\$20,000).

Estimated Project Timeline

RFP released: January 6, 2026

Proposals due: February 2, 2026

Interviews and selection: February 2026

Project start:

Phase One: March 2026 (or as mutually agreed)

Phase Two: July 1, 2027, or upon completion of Phase One is prior to July 1, 2027.

Project Completion:

Phase One: June 30, 2027

Phase Two: November 15, 2027

How to Apply

Please send RFP responses and inquiries to Kim Harrington, Grant and Contracts Associate, at kharrington@lincolnlegal.org with the subject line "RFP Intake & Referral Modernization Project" by February 2, 2026.

Response Requirements

- Firm capabilities and relevant experience with LegalServer and legal aid intake/referral modernization.
- Examples of prior work (e.g., Guided Navigation builds, electronic referral/intake forms, training materials, evaluation reports).
- Project outline, workplan, and timeline tied to the Desired Deliverables.
- Line-item budget and pricing assumptions; identify any variable costs (e.g., travel).
- Key personnel with roles and qualifications; include CVs or bios.
- Client list highlighting similar engagements and three references.
- Any additional information pertinent to consultant selection.

Evaluation Criteria

- Technical approach and understanding of Land of Lincoln's goals and deliverables.
- Demonstrated experience with LegalServer Guided Navigation, online intake/referral integrations, and justice partner workflows.
- Quality of prior work products and references.
- Project management plan, staffing, and timeline feasibility.
- Cost effectiveness and alignment with the Budget Guidance.
- Commitment to accessibility, data security, and compliance.
- Strength of training, documentation, and change management plan.