



Legal Services of
the Hudson Valley
Protecting Rights Promoting Justice

REQUEST FOR PROPOSAL: LSHV INTAKE PROCESS

Goal

Legal Services of the Hudson Valley is seeking a comprehensive Business Process Improvement Plan that will evaluate, assess, and prepare for future implementation of multilingual, AI-supported technologies to our intake system. We are seeking to streamline the client intake process and identify opportunities to increase language access, efficiency, precision and consistency and improve the applicant's experience while implementing AI tools.

LSHV is seeking a consultant with experience in intake process and work-flow mapping. This consulting work will include critically evaluating LSHV's current client intake, structured call center, language access, interview process, transfer and case acceptance processes.

About LSHV

For over 50 years, Legal Services of the Hudson Valley (LSHV) has provided high-quality, free civil legal representation to individuals who cannot afford counsel for issues affecting the basic necessities of life. We offer free legal assistance to low-income residents across seven counties in the Hudson Valley, operating from ten offices throughout the region. As the sole provider of comprehensive civil legal services in our area, we support clients with everything from legal advice to full representation.

Our mission is to deliver exceptional legal counsel in civil matters to low-income individuals, families, and other vulnerable populations who lack access to representation.

Project Description

The project is to conduct a business process improvement plan of Legal Services of the Hudson Valley's intake process from all points of client entry through the intake process to identify areas for opportunities to increase language access, efficiency, accuracy, consistency and improve applicant experience with the implantation of AI tools. The intake process will be mapped and evaluated for its language access, use of technology, efficiency, effectiveness, and client experience. The analysis will consist of interviewing our staff, reviewing our current intake process by examining our system, technologies and data regarding call volumes, language access, and use of AI to better assist with the intake process. 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. Findings will be presented to the Legal Services of the Hudson Valley leadership team including an intake improvement plan with recommendations on process and technology improvements which must include language access and use of AI.

Legal Services of the Hudson Valley anticipates the project will take approximately 1=5 months from November 2025- February 2027.

The maximum amount of payment for all work performed for the project is \$34,000.

Qualifications

- Experience providing intake business process analysis to legal service organizations, and a professional reputation of having successfully implemented the same.
- Experience with telephone systems, call flows and online intake including language access and use of AI.
- Experience with AI driven online intake systems, either chatbot driven or automated document generation with branching logic.
- 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 LegalServer case management system

Desired Deliverables

- Comprehensive review and documentation of LSHV's current client intake, including, client acceptance processes, including review of all current, language access, intake portals, transfers processes, work-flow and LSHV's client acceptance priorities (CAPs).
- Evaluate the efficiency and effectiveness of each process, identifying gaps and needed improvements.
- Evaluate our CAPs 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 LSHV's current intake, transfer and client acceptance process as well as the evaluation of each process.
 - This report should include areas of improvement and opportunities to transform the intake system to make it more efficient and effective. It should provide detailed suggestions to improve LSHV's language access, client intake and transfer processes, including new call flow diagram, workflows and needed intake staffing levels and a plan to implement said improvements. It must also include the use of AI or other similar systems to assist with the online intake process. Provide detailed suggestions to improve LSHV's current CAPs, outline recommended changes and a plan to implement said changes.

Selection Schedule (Subject to Change)

- RFP released: 10/24/2025

- Deadline for bidder questions: 11/14/2025
- LSHV answers due: 11/21/2025
- Bidder proposals due: 12/5/2025
- Contract signed and work commences: As soon as possible after successful vendor notification

How to Apply

Please send RFP response and inquiries to Rebecca Bergman rbergman@lshv.org with the subject line "Legal Services of the Hudson Valley Intake Project- RFP Response"

Response Requirements

- Describe you/ your firm's capabilities. Specifically, include your experience working with nonprofits, law firms and or legal services organizations and your ability to provide each of the above identified Desired Deliverables.
- Sample documents and presentations from previous similar projects, such as the comprehensive review of intake, transfer and client acceptance processes, recommended call flow diagram, case acceptance priorities document and simplified "playbook" or "decision-tree" version of the priorities document.
- Project outline and timeline
- Line-item proposal with detailed information about expenses will be covered under each cost, and any variable expenses (e.g., travel reimbursement).
- List the principal consultants who will work directly on each component of this project, as well as their qualifications.
- Provide the client list, highlighting successful intake process mapping work.
- Provide three references from past clients.
- Include any additional information you deem pertinent to consultant selection.