



California Indian Legal Services

Request for Proposal

Consultant for Evaluation of the Intake System Optimization Project

Issue date: June 8, 2026

Due date: July 6, 2026 @ 5:00PM PDT

1. Invitation

California Indian Legal Services (CILS) invites proposals from qualified consultants to serve as the independent evaluator for its Intake Systems Optimization Project, which is currently being implemented and scheduled for completion in June 2027. The evaluation will occur at both the beginning stage of project implementation and after implementation is complete, assessing the effectiveness, efficiency, and overall impact of the new intake system on service delivery, client experience, and internal operations.

Ideal applicants will have proven experience conducting program evaluations in nonprofit and/or legal aid environments, expertise in both qualitative and quantitative methods, and a demonstrated commitment to culturally responsive, equity-centered evaluation—particularly in partnership with Tribal communities.

The final evaluation report must be submitted no later than **July 31, 2027**.

2. Introduction

California Indian Legal Services (CILS) invites proposals from qualified consultants to serve as the independent evaluator for its Intake Systems Optimization Project. The consultant will conduct a comprehensive evaluation to assess the effectiveness, efficiency, and overall impact of the new intake system on service delivery, client experience, and internal operations.

3. About CILS

California Indian Legal Services is one of the oldest not-for-profit law firms in the country that is devoted exclusively to the cause of Native American rights in California.

Governed by a Board of Trustees and Tribally chartered, CILS has provided free and low-cost legal services to California Tribes, Tribal organizations, and Native American individuals throughout the State since 1967.

CILS maintains four locations throughout California and is supported by grants from Tribes, Legal Services Corporation, Department of Justice, State Bar of California, private foundations, and individual and corporate contributors as well as contract from a host of California's 109 federally recognized Indian Tribes.

CILS has a staff of 37 employees working out of four regional field offices. The field offices serve clients in urban and remote rural settings. The Principal Office (Headquarters) is housed in the Sacramento, CA field office location. Go to www.calindian.org for more information.

CILS is in a period of modernizing and automating many of its administrative operations with the vision to grow and expand access to services for clients throughout the state.

4. Project Objectives and Scope of Work

The objective of this project is to assess the effectiveness and impact of the Intake Optimization Project currently being implemented by California Indian Legal Services (CILS). This includes evaluating the performance of the new intake system in terms of service delivery, client access, staff efficiency, and overall organizational responsiveness.

The evaluation will be conducted by an independent consultant to ensure objectivity and credibility. The consultant will work closely with CILS to carry out a comprehensive and data-informed assessment, guided by the following core responsibilities:

- **Collaborative Planning:** Work with CILS to establish a shared evaluation framework that aligns with the goals of the Intake Optimization Project. This includes identifying key focus areas, success indicators, and appropriate methodologies that reflect the unique context of CILS' legal services and Tribal communities.
- **Strategic Data Gathering:** Design and implement an inclusive data collection strategy that captures both quantitative metrics (e.g., system performance, intake volume, efficiency) and qualitative insights (e.g., client and staff experience, usability, and satisfaction).
- **Impact Evaluation:** Analyze the effects of the new intake system on CILS' ability to serve its client communities effectively and equitably. Evaluate changes in access to services, internal workflow, and the client journey from intake to resolution.
- **Insight Generation:** Identify trends, strengths, and areas for improvement based on empirical findings, and interpret those insights in ways that are actionable, meaningful, and aligned with CILS' strategic goals.
- **Learning and Sustainability:** Provide findings and recommendations that support CILS' long-term planning, including considerations for system refinement, future scaling, and sustainable practice improvements.

This work will be conducted in close coordination with CILS' leadership and project team, with a strong emphasis on cultural relevance, inclusivity, and data-driven decision-making.

5. Project Deliverables

The selected evaluator will be expected to provide the following deliverables over the course of the engagement:

5.1. Finalized Scope of Work and Contract

- Confirmation of evaluator qualifications and experience
- Executed agreement outlining responsibilities, timeline, and payment terms

5.2. Written Evaluation Plan

- Defined evaluation focus areas, goals, and key questions
- Selected data points and collection methods (e.g., surveys, interviews, usage metrics)
- Timeline for all phases of evaluation activities
- Documentation of baseline data and benchmarking strategy

5.3. Data Collection Summary

- Summary of methods used and number of participants
- Compilation of quantitative data on intake performance (e.g., volume, timeliness, usage)
- Compilation of qualitative feedback from clients and staff

5.4. Data Analysis and Visualizations

- Synthesized findings identifying trends, strengths, and gaps
- Assessment of system impact on service delivery and client experience
- Visual representations (e.g., charts, graphs) to support key findings

5.5. Final Evaluation Report

- Comprehensive report including methodology, findings, and conclusions
- Actionable recommendations for refinement, scaling, and sustainability
- Summary of internal discussions and responses to findings
- Report submitted by agreed-upon deadline

5.6. Presentation of Findings (Optional)

- Oral presentation or slide deck summarizing the report
- Q&A session with CILS leadership and/or project team

All deliverables should be submitted in editable formats (e.g., Word, Excel, PDF) and comply with accessibility standards.

6. Proposal Content

6.1 Description of Responder:

Provide the following:

- Responder's full legal name;
- Responder's head office mailing (for billing) and website address;
- Name, telephone number, email address of the responder's designated contact person;
- Expertise of the responder, including the core focus of services provided by the responder;
- Identify the names of principal staff and key personnel who will provide the services.
 - Submit resumes or qualifications for each key staff person, summarizing their experience and expertise.
 - Describe each person's role and responsibility with the project.
 - Any substitutions of staff after the award of the contract will require the approval of CILS.
- Signature of an officer or other person who is legally authorized to bind the applicant to the proposal cost and schedule.
- The name, title, address and contact information of three references for clients who you have provided the same or similar services. Provide information on the actual services provided and length of time services were provided to client. Nonprofit reference, specifically related to organization providing legal services are preferred.

6.2 Understanding of Project:

Provide a description of:

- A brief statement of your understanding of the services to be performed.
- Your approach and methodology for providing these services.

- c. How your organization is positioned to provide and a history of the experience providing similar services. Explain any history you have working with legal services organizations, including knowledge of resources available to nonprofits.

6.3 Pricing

Total proposed project cost itemized as appropriate.

7. Proposal Assessment Process and Criteria

All proposals will be evaluated by CILS. Notwithstanding any other provision in the RFP, CILS reserves the right to accept the proposal that it deems in its sole discretion most advantageous and the right to reject any or all proposals without giving any notice or reasons. The proposal having the lowest cost to CILS will not necessarily be accepted.

8. Cost of Proposal

The available budget for the project is \$25,000.

The Consultant shall bear all costs associated with any proposal meeting(s), interview(S), or preparation and submission of the bid and CILS shall not be responsible or liable for any costs, regardless of the conduct or outcome of the solicitation and request for quotations.

9. Proposal Evaluation Criteria

CILS may consider any criteria it desires, including, without limitation, those listed below (not necessarily in order of importance):

- a. Demonstrated understanding of the project objectives, scope, requirements.
- b. Professional qualifications, reputation, capability, and experience.
- c. Ability to address technical, functional and business requirements.
- d. Cost of the project.
- e. Quality of the proposal.

The successful contractor may be asked to participate in negotiations and may be asked to revise their proposal based on the negotiations. In submitting a quotation, each contractor acknowledges that they have read and understand these requirements.

10. Timelines and Milestone Dates

- Request for Proposals issued: 06/8/2026
- Request for Proposals due: 07/6/2026 by 5:00PM PDT
- Projected Award date: 07/24/2026
- Contract Date: 07/24/2026
- Project Start Date: 07/24/2026
- Desired completion date: 07/31/2027

11. Contacts, Inquiries, Clarifications and Submission

Please send completed proposals and all inquiries/questions regarding this RFP via email to:

Veronika Brown
Director of Compliance and Legal Technology
rfp@calindian.org

CILS will only accept submissions as attachments to an email.