



Pennsylvania Legal Aid Network, Inc.

Request for Proposals

Statewide Intake Improvement Project — Phase 1: Assessment and Planning

Issue Date: September 24th 2026

Proposal Due Date: October 22th 2026

1. Invitation

The Pennsylvania Legal Aid Network, Inc. (PLAN, Inc.) is a client-centered organization that provides leadership, funding, and support to improve the availability and quality of civil legal services to low-income individuals and families in Pennsylvania. PLAN, Inc. does this primarily by funding and coordinating civil legal aid services provided by 13 legal services providers (LSPs) across the Commonwealth, referred to collectively as the Pennsylvania Legal Aid Network (PLAN). The network is made up of seven independent regional legal service programs that meet a variety of civil legal needs in a defined region of the Commonwealth; and six specialized legal services programs that provide statewide support to clients in a specific area/s of the law. PLAN, Inc. invites proposals from qualified consultants or firms (“Vendor” or “Consultant”) to conduct Phase 1 of PLAN’s Statewide Intake Assessment Project: an independent, organization-by-organization assessment of the client intake processes used by the 13 LSPs within PLAN.

This is a multi-phase initiative. This RFP solicits proposals for **Phase 1 only**: a comprehensive, individualized assessment of each Legal Service Provider’s current intake process as well as organization-specific and statewide recommendations for improvement. The goal of these assessments is to develop a set of recommendations to standardize and streamline how clients access legal aid services throughout the Commonwealth while generating consistent data to measure our impact and drive continuous improvement. The Consultant is not being asked to design, build, or implement a shared statewide intake system, nor to recommend that Legal Service Providers adopt uniform or coordinated processes, unless an individualized assessment independently supports such a recommendation. The finalized set of recommendations will be used by the Consultant to develop an implementation plan, including requests for proposals for subsequent Phases, in conjunction with PLAN Inc. and the LSPs. PLAN, Inc. has not made any determination about the outcome, direction, or scope of any future phase, and none should be inferred from this RFP. Recommendations arising from any future phase, if PLAN, Inc. elects to pursue one, will be informed by the individualized findings produced under Phase 1. PLAN, Inc. anticipates Phase 1 will take approximately **nine (9) to twelve (12) months** from contract execution to delivery of final reports, though Vendors should propose the timeline they believe is realistic for the scope described herein (see Section 10).

Consultants or firms participating in Phase 1 of this project will be eligible to solicit to participate in future Phases of this project, if PLAN Inc. elects to pursue subsequent Phases. PLAN, Inc. is not obligated to provide any future work to PHASE 1 consultants.

2. Introduction and Background

About PLAN, Inc.:

PLAN, Inc. coordinates statewide legal services on behalf of its thirteen member Legal Service Providers (LSPs), which independently provide free civil legal assistance to low-income Pennsylvanians and families. Each Legal Service Provider is an independent non-profit organization and operates its own intake process. The different intake processes have evolved independently over time in response to specific client population and geographic needs, funding, and technology. All PLAN network LSPs are required to use LegalServer as their case management system and system for sharing data with PLAN, Inc. All LSPs also have access to a unified, statewide online intake system, although this system is not used by the entire network and is not mandatory. All PLAN network LSPs use the same primary software suite.

PLAN, Inc. is undertaking this Statewide Intake Assessment Project to better understand the current state of intake across the network. Data and anecdotal information suggest that intake processes, technologies, staffing levels, and challenges vary considerably among the network LSPs. PLAN, Inc. is seeking the following to inform PLAN, Inc.'s planning for any subsequent, separately scoped phase(s) of work:

1. An objective, individualized, and data-supported analysis — not a predetermined redesign — to inform each Legal Service Provider's own decision-making about intake processes and
2. A set of recommendations to standardize and streamline how clients access legal aid services throughout the Commonwealth while generating consistent data to measure our impact and drive continuous improvement.

3. Legal Service Providers

This engagement covers the thirteen (13) Pennsylvania legal aid organizations in the PLAN network.

Collectively, the LSPs currently operate 67 offices across the Commonwealth with the highest concentration of offices in the southeastern and southwestern regions of Pennsylvania. There is enormous diversity among LSPs in how they conduct intake; in addition, some LSPs conduct intake differently across their own offices. These differences are typically the result of local factors or the needs of a particular client population. All but two programs offer walk-in intake, allowing potential clients to have their intake information collected in-person and typically without an appointment, but LSPs may not offer this at each of their offices. 48 offices offer "walk-in" intake. All programs offer telephone intake. At some LSPs telephone intake is done through a phone hotline which may be hosted from a single office site and at other LSPs the hotline staff is spread out among multiple offices. 22 offices host an intake telephone hotline or coordinated phone intake for the program.

The majority of intake throughout the network is done over the phone. With only a few exceptions, programs report at least 75% of their intake is done over the phone. For programs with slightly lower phone intake numbers, walk-in intakes are the next most common form of intake. PLAN maintains a statewide system for clients to begin the intake process online, with that information being sent to the appropriate LSP. The extent to which programs are using the statewide online intake system varies significantly. The average program using the online intake system reports about 10%-20% of their intakes originating from this system. One program does intake exclusively through the online intake system, and one program does intake predominantly through the mail. LSPs also do a limited number of intakes off-site at community education events, outreach sites, or clinics.

LSP names, service areas, and organization-specific background will be provided to the selected Consultant, and made available to shortlisted Vendors upon request, subject to confidentiality obligations in outlined below.

4. Project Objectives

The Consultant will work independently with each Legal Service Provider to:

1. Conduct a thorough assessment of that provider's intake process(es), across all intake channels used by that organization (e.g., telephone, online/web-based intake, walk-in, partner/community referral, outreach/clinic intake, mail, hotline).
2. Identify that organization's specific strengths, gaps, bottlenecks, and barriers to access (including barriers for limited-English-proficient applicants and applicants with disabilities).

The Consultant will work with PLAN, Inc. to:

3. Deliver a consolidated report for PLAN, Inc. (see Section 6) that includes detailed and specific recommendations on opportunities for statewide improvements that meet the goals of better serving clients and allowing LSP staff to work more efficiently and productively. The consolidated report should focus on opportunities for standardizing and streamlining the provision of legal services in Pennsylvania. The Consultant should note patterns or themes across legal services providers in the coordinated summary report as well as best practices and statewide recommendations.

The Consultant will work with PLAN, Inc. and LSPs to:

4. Use the accepted recommendations to work to develop a detailed, actionable implementation plan including necessary RFPs for vendors, services, or consultants required to implement subsequent Phases of the project.
5. Work from the consolidated report, and using it as a departure point, to develop, for each LSP that requests one, an individualized set of prioritized actionable recommendations for process, staffing, and technology improvements that reflect the goal of standardization as well as the particular LSP's own capacity, resources, mission, and community, distinguishing near-term/low-cost recommendations from longer-term or technology-dependent recommendations

The Consultant's scope is limited to assessment, recommendations, and developing an implementation plan (including needed RFPs) for subsequent Phases.

5. Scope of Work

5.1 Project Planning and Kickoff

- Meet with PLAN, Inc. leadership and small group of LSP executive directors to finalize the project workplan, communication protocols, data-sharing agreements, and a schedule for engaging each Legal Service Provider.
- Develop a written assessment framework/methodology and data collection instruments (interview guides, surveys, site-visit protocols) in consultation with PLAN, Inc., allowing for reasonable customization to each organization's context.
- Establish confidentiality and data security protocols for handling any client-related or applicant-related data, consistent with the requirements of each Legal Service Provider's policies.

5.2 Individualized Assessment of Each Legal Service Provider

For each of the thirteen (13) Legal Service Providers, the Consultant will, at a minimum:

- Review and document all current intake pathways/channels used by that organization — including channels operated at individual offices (e.g., in-person/walk-in intake), not solely centralized intake lines — and the volume of applications/intakes handled through each.
- Review the technologies used to support intake (e.g., case management system and version/modules, telephone/call center system, online intake forms, scheduling tools) and how effectively they support that organization's process.
- Conduct interviews and/or surveys with that organization's intake staff, supervising attorneys, and relevant leadership, as well as relevant external stakeholders where appropriate (e.g., community-based organizations or partners that refer clients to or from the organization).
- Where feasible and agreed with the organization, gather input from applicants/clients regarding their intake experience (e.g., wait times, ease of access, clarity of communication, language access).
- Analyze available quantitative data (e.g., call volume, hold/talk time, time from first contact to eligibility determination or case acceptance/rejection, abandonment rates) to the extent such data exists and is made available. Where an organization's current systems do not produce sufficient data to establish a meaningful baseline, identify what data and/or system changes would be needed to do so going forward.
- Identify inefficiencies, redundancies, technology gaps, staffing constraints, and accessibility barriers (including language access and disability access) specific to that organization.
- In consultation with PLAN, Inc. and each LSP, help define what "success" means for that organization's intake process (which may reasonably differ across organizations — e.g., reducing client wait times versus addressing insufficient attorney capacity to accept identified cases) and propose metrics to track progress toward it.
- Benchmark findings against general legal aid intake best practices where useful, while accounting for that organization's size, resources, geography, and client population.
- After finalizing the consolidated report and using it as a departure point, develop, for each LSP that requests one, an individualized set of prioritized actionable recommendations for process, staffing, and technology improvements that reflect the goal of standardization as well as the particular LSP's own capacity, resources, mission, and community, distinguishing near-term/low-cost recommendations from longer-term or technology-dependent recommendations.

5.3 Governance and Sustainability Considerations

The Consultant will:

- Note, where relevant to a specific recommendation, any governance, standard-setting, or accountability considerations that PLAN, Inc. and/or the affected Legal Service Provider(s) would need to address in order

to implement and sustain that recommendation (e.g., how expectations would be set and maintained between organizations with a referral relationship).

5.4 Consolidated Summary Reporting to PLAN, Inc.

- Prepare a consolidated summary report for PLAN, Inc. describing the assessment methodology, participation, and any observed cross-organization themes, technology trends, or common challenges
- Present findings to PLAN, Inc.'s leadership and, as requested, to Legal Service Providers' leadership and/or PLAN Inc.'s governing/advisory bodies.
- Present any statewide recommendations for intake efficiencies including, but not limited to, suggestions that promote client access to legal services, uniform data collection, and address staffing challenges.

5.5 Develop an Implementation Plan for Accepted Recommendations

- Work with PLAN Inc. and the Network to develop a detailed and actionable implementation plan that incorporates accepted recommendations for subsequent Phases of this project. This would include the development of RFPs needed for any necessary work requiring vendors, services, or consultants.

5.6 Ongoing Collaboration

- Meet regularly (e.g., weekly and/or monthly, and as needed) with the PLAN, Inc. project lead identified in to review progress, address challenges, and confirm scheduling with each Legal Service Provider.
- Provide brief written status updates at intervals to be agreed with PLAN, Inc.

6. Project Deliverables

Deliverables produced under this engagement are for the use of PLAN, Inc., and the applicable Legal Service Provider(s) listed below. Ownership, use, and distribution of deliverables are addressed below.

1. Project Plan and Assessment Methodology, including data collection instruments, and a schedule for engaging each Legal Service Provider.
2. Thirteen (13) individual process maps/workflow diagrams, one per Legal Service Provider, in an editable format.
3. A Consolidated Summary Report for PLAN, Inc. synthesizing the assessment process and any cross-organization observations, clearly distinguished from organization-specific findings and recommendations and network-wide findings and recommendations aligned with Objectives 4(3) and 5.4.
4. A presentation of findings to PLAN, Inc.'s leadership, and additional presentations to individual Legal Service Providers upon request (format — virtual or in-person — to be agreed).
5. A detailed, actionable implementation plan for recommendations that are accepted. This plan will be the basis for subsequent Phases of this project and will include RFP's for needed vendors/consultants.
6. Up to thirteen (13) individual, organization-specific sets of recommendations — one for each Legal Service Provider that requests one — including: (a) description of current intake workflows and process map(s); (b) technology and staffing review; (c) gap analysis; (d) prioritized, actionable recommendations for process, staffing, and technology improvements that reflect the goal of

standardization as well as the particular LSP's own capacity, resources, mission, and community, distinguishing near-term/low-cost recommendations from longer-term or technology-dependent recommendations

7. (f) an implementation-readiness assessment for each recommendation; and (g) as applicable, any governance/sustainability considerations identified under Section 5.3.
8. All underlying data collection materials, interview/survey summaries, and work papers, delivered in editable formats (e.g., Word, Excel) and compliant with accessibility standards.

7. Consultant Qualifications

PLAN, Inc. seeks a Consultant (individual or firm, including subcontracted team members as applicable) with:

- Demonstrated experience conducting intake or business-process assessments for legal aid, nonprofit, or other public-interest service organizations; experience across multiple, independently operating sites or organizations is preferred.
- Experience with legal aid intake channels, including telephone/call center systems, online/web-based intake, and walk-in/outreach intake.
- Familiarity with legal aid case management systems (e.g., LegalServer or comparable systems) preferred.
- Experience conducting qualitative and quantitative data collection (staff interviews/surveys, applicant/client interviews, data analysis) and translating findings into actionable, organization-specific recommendations.
- Experience developing implementation plans for intake systems improvements, including technology improvements.
- A demonstrated commitment to equity, language access, and accessibility for individuals with disabilities in process design and recommendations.
- Sufficient staffing capacity to conduct thirteen (13) independent organizational assessments within the proposed timeline; Vendors should describe how their team will be structured and scaled to do so.

8. Proposal Content

8.1 Description of Vendor

- Vendor's full legal name, head office address (for billing), and website address.
- Name, telephone number, and email address of the Vendor's designated contact person.
- Description of the Vendor's expertise and core focus of services.
- Names, roles, and qualifications of principal staff/key personnel who will provide services, including resumes and a description of each person's role and the percentage of time each is expected to dedicate to the project. Any post-award substitution of key staff requires PLAN's prior written approval.
- Signature of an individual authorized to bind the Vendor to the proposed cost and schedule.
- Three (3) references from clients who received the same or similar services, including contact information, a description of services provided, and the length of the engagement. References from nonprofit or legal aid organizations are preferred.

8.2 Understanding of the Project and Proposed Approach

- A statement of the Vendor's understanding of the services to be performed, including an acknowledgment of the individualized, non-predetermined nature of the assessment described in Section 4.
- Proposed approach and methodology, including how the Vendor will tailor its assessment to each Legal Service Provider's unique circumstances while maintaining a consistent, comparable methodology across all thirteen (13) assessments.
- The Vendor's approach to identifying or establishing baseline intake data/metrics for each organization (including where current systems do not readily produce such data) and to helping define what "success" looks like, recognizing this may differ by organization (see Section 5.2).
- The Vendor's approach to identifying governance, standard-setting, or accountability considerations relevant to specific recommendations, consistent with Section 5.3 (i.e., without presuming a statewide governance outcome).
- A staffing plan describing how the proposed team will manage thirteen (13) concurrent or sequential organizational assessments within the proposed timeline, including the Vendor's proposed approach to on-site/in-person visits versus remote engagement for each Legal Service Provider (see Section 8.4 and Appendix A).
- History and experience providing similar services, including experience with legal aid or other nonprofit organizations and knowledge of resources available to nonprofits.
- Sample work product from a comparable prior engagement (e.g., a redacted sample assessment report, process map, or gap analysis), intake improvement implementation plans, if available.

8.3 Proposed Timeline

- A detailed project timeline and milestones responsive to Section 10, including the Vendor's proposed sequencing for engaging the thirteen (13) Legal Service Providers.

8.4 Pricing

- Total proposed project cost, itemized by major task/phase (see Section 5) and, if useful, by Legal Service Provider or per-organization unit cost.
- Identification of any other assumptions, exclusions, or variable costs (e.g., translation/interpretation services).
- If the Vendor's recommended approach cannot be fully delivered within the budget stated in Section 9, a description of what a reduced or phased scope would look like within that budget, rather than declining to propose.

9. Budget and Cost of Proposal

Available budget: [\$150,000 - \$250,000]

PLAN, Inc. is providing a budget figure or range above so that Vendors can scope their proposed approach accordingly, and so that PLAN, Inc. can evaluate proposals on a consistent, comparable basis. PLAN, Inc. recognizes that a stated budget also helps Vendors determine, before investing time in a full proposal, whether this engagement is a good fit for their firm's capacity and pricing model.

For reference only, PLAN, Inc. understands from public sources and informal market feedback that a comparable business-process/intake assessment for a single legal aid organization has typically cost in the range of approximately \$25,000 to \$50,000. Vendors should not assume this figure scales linearly across thirteen (13) organizations and PLAN, Inc. encourages Vendors to describe in their proposal any economies of scale, staffing efficiencies, or phased-pricing approach that inform their total proposed cost.

Vendor must include a description of expected travel costs which includes the number of site visits and the purpose of these visits. The justification for on-site work and meetings, as opposed to remote work, should be explained in the proposal. All budgets must include a budget line item for travel and any additional expenses associated with Vendor's work on-site.

The Vendor shall bear all costs associated with preparing and submitting a proposal, and any proposal meetings or interviews. PLAN, Inc. shall not be responsible for any such costs, regardless of the conduct or outcome of this solicitation.

Proposals will not necessarily be awarded to the lowest-cost Vendor. PLAN, Inc. reserves the right to negotiate cost and scope with the selected Vendor prior to contract execution.

10. Estimated Project Timeline

Milestone	Date
RFP released	9/24/2026
Deadline for written questions	10/08/2026
PLAN, Inc. responses to questions posted/distributed	10/15/2026
Proposals due (target: ~4 weeks after RFP release — see Section 10 note)	10/22/2026
Interviews (if conducted)	to 11/9/2026
Consultant selected and notification by	11/16/2026
Phase 1 start	12/01/2026
Below is a proposed schedule of implementation and deliverables post vendor selection. Vendor proposals should include the vendor's proposed dates for all steps and deliverables based on a 9 to 12 months from Phase 1 start.	
Individual organization assessments completed	5/14/2027
Draft consolidated summary report to PLAN, Inc.	6/15/2027
Present Consolidated Summary report to PLAN, Inc. and Legal Service Providers	6/30/2027
Based on accepted Recommendations develop implementation plan and RFPs	7/15-9/13/2027
Deliver Implementation plan and RFP's for subsequent Phase	9/13/2027

11. Ownership, Confidentiality, and Use of Deliverables

- All deliverables produced under this engagement are for the use of PLAN, Inc. and the applicable Legal Service Provider(s) and are their property. Deliverables, work papers, and analyses may not be distributed or released to third parties without the prior written consent of PLAN, Inc. and, for organization-specific findings, the applicable Legal Service Provider.
- The Consultant will treat as confidential any client, applicant, staff, or operational data obtained from PLAN or a Legal Service Provider, and will comply with applicable confidentiality requirements, including any requirements related to attorney-client privileged or protected client information.
- Each Legal Service Provider's individual assessment report and underlying data will be shared with that organization and with PLAN, Inc.. PLAN, Inc. will determine, in consultation with each Legal Service Provider, whether and how organization-specific findings may be referenced in the consolidated summary report described in Section 5.4.

12. Contacts, Inquiries, and Submission Instructions

Submit proposals and direct inquiries to: *Erik Hansen, Director of Technology and Data*

Email: grants@palegalaid.net

Subject line: *PLAN Inc. Intake Assessment RFP — Firm Name*

Format: Applicants should include a PDF of their proposal as an attachment.

Proposals must be received by the deadline stated on the cover page. Late proposals will not be considered. All questions regarding this RFP must be submitted in writing to the contact above by the deadline in this section. PLAN, INC. will distribute written questions and answers to all prospective Vendors who have indicated interest.

13. Proposal Evaluation

All proposals will be evaluated by PLAN, Inc. PLAN, Inc., Inc. reserves the right to accept the proposal it deems, in its sole discretion, most advantageous to PLAN, Inc. and the Legal Service Providers, and to reject any or all proposals without notice or stated reasons. The lowest-cost proposal will not necessarily be accepted. PLAN, Inc. may consider any criteria it deems relevant, including, without limitation:

- Demonstrated understanding of the project objectives, scope, and the individualized nature of the assessment
- Professional qualifications, relevant experience, and capacity to staff thirteen (13) concurrent or sequential organizational assessments.
- Quality, clarity, and feasibility of the proposed methodology and timeline, including the approach to shared definitions, baseline data/metrics, and governance considerations.
- Cost of the project and cost-effectiveness relative to the budget.
- Quality of references and prior work samples.
- Demonstrated commitment to equity, language access, and disability access.

The successful Vendor may be asked to participate in negotiations and to revise its proposal accordingly. By submitting a proposal, each Vendor acknowledges that it has read and understands these requirements.

14. General Terms and Conditions

- This RFP does not commit PLAN, Inc. to award a contract, to pay any costs incurred in preparing a proposal, or to procure or contract for the described services. PLAN, Inc. reserves the right to reject any or all proposals, to waive minor irregularities, to request clarification or additional information from any Vendor, and to cancel, amend, or reissue this RFP at any time.
- Any contract resulting from this RFP is subject to the execution of a written agreement between PLAN, Inc. (and/or the applicable Legal Service Provider, as appropriate) and the selected Consultant.
- Proposals submitted in response to this RFP become the property of PLAN, Inc. PLAN, Inc. reserves the right to use ideas contained in any proposal without obligation to the Vendor, except as otherwise agreed in a final contract.
- The Consultant selected will be required to carry insurance and to agree to indemnification, data security, and other standard contract terms to be provided upon selection.

Appendix A: Legal Service Provider Technology Profile – available on request

PLAN, Inc. will provide an anonymized organization-level information upon request to help Vendors scope their proposed approach, staffing, site-visit plan, and pricing on a consistent basis. This information will include information on program size, numbers of cases handled, a percentage of intakes by type (walk-in, online, helpline etc.).

— *End of Request for Proposals* —