

Coordinated Statewide Intake (CSI) Transformation Project – Legal Services Corporation Technology Initiative Grant (TIG)

REQUEST FOR PROPOSALS

Technology Consultant – Senior Advisor & Quality Assurance Lead

RFP Issue Date	Friday, October 16, 2026
Proposals Due	Friday, November 6, 2026
Anticipated Contract Execution & Kickoff	Early December 2026
Grant Term	18 months
Consultant Engagement Span	Approx. Months 2–18
Total Consultant Budget (Not to Exceed)	\$70,000

Submit Proposals To:

Sarah Lipka, Director of Advocacy, Southern Colorado

slipka@colegalserv.org

(719) 471-0380 ext. 132

Colorado Legal Services – 102 South Tejon St, Ste 430,
Colorado Springs, CO 80903

I. Introduction and Background

Colorado Legal Services (CLS) is a statewide provider of free civil legal services to low-income Coloradans. CLS's Coordinated Statewide Intake (CSI) unit serves as the main point of access for applicants seeking legal help across the state. CSI staff screen applicants for eligibility, in some cases provide advice, and route other applicants to the appropriate CLS office or unit for further assistance.

In 2025, CLS partnered with ThredPartners to conduct a Business Process Analysis (BPA) of the CSI system, which resulted in a comprehensive final report (BPA report). The BPA report concluded that CLS's intake system is well-established, mission-driven, and supported by skilled staff. The report recommended improving workflows, which would create efficiencies that would allow staff to more easily and effectively serve CLS applicants.

Like many legal aid programs, CLS does not have the resources to serve everyone who qualifies for our services. Approximately 661,935 Coloradans meet income eligibility for free civil legal services. Meeting even 25% of that need would require processing 259 intakes daily. CLS does not currently have the capacity to meet that need. Recognizing that CLS cannot meet this need with our current staff size, the report shares recommendations that, if implemented, would streamline the intake process and improve workflows for both applicants and staff.

The report concluded that expanded use of technology is one of CLS's major untapped assets. CLS has invested in reliable tools (LegalServer, Microsoft 365, SharePoint, and the Zoom Phone system), but these systems, for the most part, operate independently, depend heavily on manual workarounds, and are not fully configured to support staff, applicants or clients. The report included ten recommendations focused on technology improvements.

CLS has been awarded an 18-month Technology Initiative Grant (TIG) from the Legal Services Corporation (LSC) to implement the three highest-priority recommendations from the BPA as part of what CLS is now referring to as the CSI Transformation Project:

1. Enhance online intake functionality and applicant communication by expanding the applicant-facing intake portal beyond a callback-request tool into a fully integrated intake process with expanded eligibility screening logic, document upload capability, and automated confirmation messaging. If the consultant agrees this might be a

good path forward, CLS may also pilot an applicant-selectable callback scheduling window workflow in the online application.

2. Optimize CLS's LegalServer instance (COLS) workflows through increased expert configuration of dynamic questionnaires, automated eligibility screening, and case routing logic.
3. Centralize case disposition guidance and integrate SharePoint with COLS to create a unified knowledge management system, replacing a fragmented, OneNote-based system.

This work will be carried out through collaborative efforts from an internal project liaison, and a qualified external technology consultant, who will serve as senior advisor, Quality Assurance (QA) lead and LegalServer developer. Numerous CLS staff members will also dedicate hours to the project, including but not limited to CLS's Assistant Director of IT and Innovation, who will serve as the primary internal technical co-implementer.

II. RFP Purpose

CLS seeks a qualified individual consultant or firm to serve as Senior Technology Advisor, and Quality Assurance Lead for the CSI Transformation Project, covering all three technology objectives described above. CLS is hoping this individual will also have LegalServer development skills, and be able to build, test and implement changes in the software. The consultant will work in close partnership with CLS's project team, including its Assistant Director of IT and Innovation — who will co-lead hands-on configuration and development across all three objectives — to provide expert audit, planning, architecture, and quality assurance support, informed by the consultant's own LegalServer and legal aid technology expertise, while also helping CLS project leadership track schedules, risks, and cross-component coordination.

This is an advisory, architectural, and hands-on role, working with CLS's Assistant Director of IT and Innovation in implementation across all three objectives. There will potentially be opportunities to hire help from vendor teams who could help us achieve our goals. Because the consultant is expected to provide direct, credible technical guidance on LegalServer configuration decisions, in addition to project management experience, CLS, if at all possible, is requesting that the individual(s) performing this work have direct LegalServer configuration expertise.

See Section IV for required qualifications.

CLS anticipates engaging a single consultant for the full engagement as project consultant lead, though CLS will consider proposals from firms that can provide continuity of a lead advisor supported by additional staff as needed. The consultant engagement is expected to run from contract execution (approximately month 2–3 of the 18-month grant term) through month 18, when the engagement is formally closed with all deliverables documented and accepted alongside a final report, including narrative and financial summaries.

III. Scope of Work

Objective 1: Enhance Online Intake Functionality and Applicant Communication

Even with recent improvements made to CLS's online intake application, it functions more as a callback-request tool than a complete intake pathway. The online application lacks document upload capability, automated confirmation messaging, complete eligibility screening logic (although current logic is extensive) and the potential to explore features such as applicant-selectable callback scheduling.

CLS's Assistant Director of IT and Innovation will lead development (with LegalServer and potentially other vendor support) as needed.

For Objective One, the consultant's role is to:

- Lead an audit of the current online intake system and produce a prioritized enhancement plan.
- Work with the Assistant Director of IT and Innovation to create a fully enhanced online intake system with expanded eligibility screening logic, document upload capability, automated confirmation messaging, and, if determined useful, applicant-selectable callback scheduling windows (as defined by CLS).
- Lead structured quality assurance sessions and provide formal sign-off recommendations before any go-lives.

- Support staff and partner-organization training on an enhanced intake system.

Key Activity / Milestone	Timeline
Building on ThredPartners' findings, lead a comprehensive online intake audit in collaboration with the project team, and produce a prioritized enhancement plan	Months 2–4
Collaborate with the project team to further define eligibility of branch logic requirements and a reconfiguration approach. The consultant, and CLS's Assistant Director of IT and Innovation, will implement and deploy these improvements with help from LegalServer support staff.	Months 5–7
In collaboration with LegalServer support, work with CLS's Assistant Director of IT and Innovation to develop a document upload feature, automated confirmation messaging, and, if determined needed, a callback scheduling window in a staging environment.	Months 7–9
Support structured QA sessions to activate and test all developed features, with formal CSI staff sign-off required before any go-lives.	Months 9–10
Support internal staff in leading partner and staff training on an enhanced online intake system.	Months 10–11
Track and report on key metrics for 60 days post-launch.	Months 11–14

Objective 2: Optimize COLS (LegalServer) Workflows Through Expert Configuration

COLS (CLS's LegalServer instance) is the platform for all intake, case management, and timekeeping across CLS's twelve offices, but its most powerful capabilities — dynamic questionnaires, automated eligibility screening, case routing, and embedded resource guidance — are only partially implemented at this time. CLS seeks a fully configured and deployed LegalServer workflow environment with documented reduction in manual data entry steps and improvements in workflow efficiency.

For Objective Two, the consultant's role is to:

- Lead a comprehensive COLS workflow assessment, building on ThredPartners' findings, documenting current usage gaps and configuration requirements.
- Provide architecture guidance for dynamic intake questionnaires, automated eligibility screening, geography and case-type routing logic, callback reminders, and embedded disposition guidance.
- Provide quality assurance for questionnaires, eligibility logic, and routing workflows configured and tested in a staging environment with CSI staff participation, prior to organization-wide deployment.
- Support the design of pre- and post-implementation staff survey documenting measurable workflow improvements.

Key Activity / Milestone	Timeline
Lead a comprehensive COLS workflow assessment, documenting current usage gaps and configuration requirements	Months 8–10
Provide architecture guidance as dynamic intake questionnaires, automated eligibility screening, and case routing logic are tested in staging	Months 10–13
Support deployment of reconfigured COLS workflows organization-wide (all twelve offices); internal staff lead training with consultant available for support.	Months 13–14
Support the design of pre- and post-implementation staff surveys and compile a performance report documenting measurable workflow improvements.	Months 14–16

Objective 3: Centralize Case Disposition Guidance and Integrate SharePoint with COLS

This objective has two parts. First, centralized, version-controlled disposition instructions and Case Acceptance Protocols (CAPs) will be embedded directly within COLS intake forms, replacing the current fragmented, OneNote-based system currently used in CLS offices.

Second, a technical integration between Microsoft SharePoint and COLS will allow staff to access documents directly from case records, building on a separate CLS-led SharePoint redesign effort expected to be completed before this integration work begins.

For Objective Three, the consultant's role is to:

- Support a joint audit of existing disposition instructions and the current SharePoint document architecture.
- Provide guidance in defining the information architecture for the COLS disposition system and the SharePoint–COLS integration, including naming conventions, version control, and permissions.
- Provide QA oversight for the COLS disposition management framework built in staging, and for migration of all disposition instructions and CAPs from OneNote, prior to office/unit lead review and approval.
- Provide architecture oversight for the SharePoint–COLS integration and confirm functional/technical requirements with the LegalServer support team.
- Support organization-wide, role-specific training on both systems.

Key Activity / Milestone	Timeline
Support a joint audit of all existing disposition instructions; define requirements for the COLS-embedded disposition system	Months 14–15
Define functional and technical requirements for the SharePoint–COLS integration with the LegalServer support team; confirm scope and cost of any improvements	Months 13–14
Provide architecture oversight as CLS's Assistant Director leads the SharePoint–COLS integration build with help and guidance from LegalServer's support team	Months 14–16
Provide framework design and QA as the disposition management framework is designed and built within COLS, embedding CAPs and instructions within intake forms	Months 15–17
Provide QA oversight for migration of all disposition instructions and CAPs from OneNote into COLS, with review and approval by all office and unit leads	Months 16–17
Support organization-wide, role-specific training on the disposition system and SharePoint integration	Month 17
Support monitoring of system usage post-launch; document reductions in misrouted cases and staff time spent searching for guidance	Months 17–18

Objective 4: Grant Compliance, Evaluation, and Reporting (CLS-led; consultant supports as needed)

CLS retains lead responsibility for grant administration, but the consultant's assessments, QA signoffs, and monitoring data directly support these deliverables:

Key Activity / Milestone	Timeline
Project Workplan submitted to LSC TIG grant manager	Months 1–2
Project Evaluation Plan drafted and submitted to LSC TIG grant manager	Months 3–6
Collect and analyze evaluation data across all three objectives against pre-implementation baselines	Ongoing, Months 2–18
Progress Report 1, Interim Financial Report, and Payment Request	Month 6
Progress Report 2, Interim Financial Report, and Payment Request	Month 12
Draft Final Report submitted to grant manager	Month 17
Approved Final Report and Final Financial Report submitted	Month 18

Cross-Cutting Consultant Responsibilities

Across all three technology objectives, the consultant is expected to:

- Serve as a thought partner and senior advisor to CLS's CSI Transformation Project's leadership and implementation team throughout the engagement.

- Commit to learning about, understanding, and supporting CLS's mission to provide excellent, free civil legal services to as many low-income individuals as possible, including developing fluency and familiarity with the nature of CLS's work and how the intake process supports that legal work.
- Support the project schedule and risk/issue log maintained by CLS' project leadership, proactively flagging dependencies and timing conflicts between components.
- Provide independent quality assurance review at each major milestone, separate from the staff performing the configuration and development work.
- Lead regular project status meetings (proposed cadence to be defined in the consultant's work plan) and provide written status updates to CLS project leadership.
- Support preparation of and provide materials for the progress reports and monitoring reports listed above.
- Coordinate as needed with LegalServer's support team and other vendors engaged in the project.
- Be available to advise on troubleshooting complex configuration issues when escalated by CLS's internal technical team, and to provide architectural guidance during peak periods.

IV. Required Qualifications and Experience

CLS is seeking a consultant or firm with the following qualifications. Proposals should address each item directly.

- Demonstrated LegalServer configuration expertise sufficient to provide credible architecture guidance and quality assurance review of questionnaires, eligibility logic, case routing rules, and workflow automation — whether gained through personal configuration work or through directing/overseeing LegalServer configuration engagements for other organizations. Proposals should name specific organizations and describe the consultant's role in that work. Demonstrated project management experience leading multi-month technology implementation projects, including developing project workplans and schedules and tracking risks and issues in support of internal project leadership.

A PMP, PMI-ACP, or equivalent certification and/or experience is desired, but not required.

- Demonstrated experience providing technology consulting to legal aid organizations, nonprofits, or comparable mission-driven service organizations, ideally including LSC-funded technology grant projects.
- Experience with Microsoft SharePoint architecture and SharePoint integrations with case management or line-of-business systems.
- Demonstrated quality assurance and testing methodology for software configuration or systems integration projects.
- Experience conducting operational or technology assessments (audits) and translating findings into prioritized, actionable plans.
- Familiarity with legal aid intake operations, eligibility screening, and disposition/case acceptance processes preferred.

DESIRED

- Strong written and verbal communication skills, including experience developing staff training materials.
- Ability to commit consistent capacity across the full engagement, estimated at approximately 16 months.
- Availability to provide at least two comparable client references, at least one of which can speak to the individual's LegalServer configuration expertise and at least one of which can speak to their project management performance.

Note on prior engagement: In developing this project, CLS held informal preliminary conversations with several consultants and vendors — including ThredPartners, Legal Aid Chicago, Georgia Legal Services Program, LHB Analytics, LegalServer, and LawDroid — to inform scope, sequencing, and feasibility. Participation in these conversations does not preclude a firm or individual from submitting a proposal, but any such prior involvement must be disclosed in the proposal.

V. Budget

The total budget available for this consultant's engagement is \$70,000, inclusive of all fees and expenses, for the full engagement (approximately 16 months, spanning months 2–18 of the 18-month grant term). Proposals must fit within this not-to-be-exceeded amount. CLS is open to reviewing proposals where some set of skills are present but not others, and proposals where all skills are present, as long as budgets reflect either approach.

Respondents should propose a fee structure (e.g., hourly rate with an estimated hours budget, fixed monthly retainer, or milestone/deliverable-based fees) and should indicate how the proposed structure aligns effort with the three objectives and their relative scope and timing.

CLS anticipates structuring payments on a periodic (e.g., quarterly, or milestone) basis consistent with the reporting cadence above (Progress Reports and Payment Requests at Months 6, 12, and 18) and its LSC grant compliance requirements.

VI. Proposal Submission Requirements

Interested consultants should submit a proposal addressing each of the following elements.

Proposals should be concise and complete; CLS anticipates most proposals will run approximately 8–10 pages, excluding resumes and references.

1. Cover Letter – summarizing the consultant's or firm's interest and qualifications for this engagement.
2. Relevant Experience – description of prior legal aid, nonprofit, or comparable technology consulting engagements, with emphasis on LegalServer and SharePoint work.
3. Proposed Approach – narrative describing the consultant's proposed approach to each of the three objectives, including how the consultant will structure the audit, advisory, architecture, and QA roles alongside CLS's internal technical staff.
4. Staffing Plan – identification of the specific individual(s) who will perform the work, including resumes/bios documenting LegalServer configuration expertise and project management experience, and confirmation of availability across the engagement term.
5. Work Plan and Schedule – proposed timeline and key milestones aligned to the objective timelines in Section III.
6. Cost Proposal – detailed fee structure and total cost, within the not-to-exceed \$70,000 budget.
7. Disclosure – identification of any prior involvement in, or relationship to, the development of this project (see note in Section IV) or any other actual or potential conflict of interest.
8. References – contact information for at least two comparable client references.
9. Sample Work Product (optional) – a redacted sample deliverable, such as a workflow assessment, audit report, or QA plan from a prior engagement.

VII. Evaluation Criteria

Proposals will be evaluated by CLS project leadership using the following criteria:

Criterion	Weight
LegalServer configuration expertise, SharePoint configuration knowledge/experience, and project management experience (relevant to the skill set proposed)	35%
Technical approach and demonstrated understanding of project scope	20%
Cost and overall value within the available budget	20%
Staffing plan, availability, and continuity across the engagement	15%
Strength of references	10%

CLS reserves the right to request interviews or clarifying information from any or all respondents before making a final selection.

VIII. Submission Instructions

Proposal Deadline: Friday, November 6, 2026, 5 p.m. MST

(Proposals remain valid for 90 days from the submission deadline.)

Questions will be responded to up to Friday, November 6, 2026

Submit To: Sarah Lipka, slipka@colegalserv.org

Format: Proposals should be submitted via email as a single PDF document.

Questions regarding this RFP should be submitted in writing to the contact above within the time period listed. Responses to questions that materially affect the scope of this RFP will be shared with all respondents who are being considered for an interview with the project team. Unsuccessful bidders will be notified if they are not selected to continue the interview process.

IX. General Terms and Conditions

- CLS is not obligated to award a contract through this RFP and reserves the right to reject any or all proposals, negotiate with any respondent, or cancel the RFP at any time.
- The selected consultant will be engaged as an independent contractor, not an employee of CLS, and will be responsible for their own tax obligations and benefits.
- This engagement is funded by a Legal Services Corporation (LSC) Technology Initiative Grant (TIG). The selected consultant will be required to cooperate with CLS's grant compliance, monitoring, and reporting obligations to LSC, including maintaining records sufficient to support grant and cost reporting.
- Respondents must disclose any actual or potential conflicts of interest, including any current or prior relationship with Legal Service Corporation, CLS, ThredPartners, LegalServer, or other consultants/vendors named in Section IV.
- CLS does not discriminate on the basis of race, color, religion, sex, gender, gender identity, national origin, age, disability, or any other status protected by applicable law, and expects the same of its contractors.
- The selected consultant will be required to carry general liability and professional liability (errors & omissions) insurance in amounts to be specified in the resulting contract, and to sign a confidentiality/data protection agreement given the sensitivity of client and case data accessible through LegalServer and SharePoint.
- All work products created under this engagement will be the property of CLS.
- CLS anticipates executing a written contract or engagement letter with the selected consultant prior to the start of work, incorporating the terms of the selected proposal.

X. Questions and Contact Information

For questions about this RFP or the CSI Transformation Project, please contact:

Name: Sarah Lipka

Title: Director of Advocacy, Southern Colorado

Email: slipka@colegalserv.org

Phone: (719) 471-0380 ext. 132

Organization: Colorado Legal Services —Colorado Springs

102 South Tejon St, Ste 430
Colorado Springs, CO 80903

Thank you for your interest in supporting the CSI Transformation Project.