

New Mexico Legal Aid  
Intake and Operational Workflow Assessment  
2026 Request for Proposals



New Mexico Legal Aid  
505 Marquette NW, Suite 700  
Albuquerque, NM 87012

Release Date: February 17, 2026

Due Date: March 9, 2026

## **Introduction**

New Mexico Legal Aid (NMLA) provides free civil legal services to low-income New Mexicans. NMLA seeks proposals from consultants that can provide intake and internal operational workflow assessment, and technology recommendation/implementation services for NMLA's 10 offices across New Mexico. The consultant will coordinate with NMLA staff and vendors to audit/assess the operational workflow of NMLA's intake and case management system and provide appropriate technology recommendation and implementation.

Funding is currently available for this project; however, the selected consultant would ideally produce an implementation plan that could be used to obtain an LSC Technology Initiative Grant.

## **Process**

Applications will be received by the Litigation Director. If the applicant is eligible and the application is complete, the application will be reviewed by NMLA's Executive Director, and the Litigation Director. NMLA's Executive Director and Litigation Director will make the final decision regarding winning proposals. NMLA will select the winning proposal in March of 2026 and desires the contract to begin on or before April 30, 2026.

## **Criteria**

NMLA has adopted the following criteria for its technology assessment:

1. Proposed timeline is:
  - a. Begin work on or before April 30, 2026.
  - b. Completion of work by July 1, 2026.
  - c. Delivery of final report and recommendations by August 1, 2026.
2. The winning consultant or organization should have a history of auditing intake processes, auditing case file management systems, providing process recommendations, software recommendations, and software implementation (see "detailed criteria" for more information).

Organization must provide NMLA with a final report, including a detailed assessment and recommendations for improvements, as well as assist with implementation of agreed upon services.

## **Detailed Criteria**

### **Intake Assessment:**

The project is to conduct a business process analysis of NMLA's intake and internal referral processes, encompassing all points of access (telephone, online, walk-in, and referral from external organizations). NMLA seeks to centralize and standardize its intake processes, identify inefficiencies and choke points, and most importantly increase accessibility for the client populations it serves. The work will consist of:

- Process mapping and workflow analysis across all NMLA's intake access points through internal referral/transfer points
- Identification of gaps and bottlenecks in the process
- Assess staff workloads, resource allocation, and technology use
  - Specifically, whether staffing levels and role distribution align with intake volume and service goals
- Technology and Automation Review
  - Assess current case management and telephony systems
  - Identify opportunities for automation, integration, and process streamlining
- Client Experience and Accessibility Assessment
  - Evaluate language access, ADA compliance, and convenience for client-eligible populations
  - Identify barriers to service and recommend client-centered improvements
- Interview and gather feedback from internal and external stakeholders
- Provide a report with findings, best practices, and actionable recommendations
  - include an implementation roadmap with short-term and long-term strategies

### **Case Management Systems and Business Processes Assessment:**

This portion of the project will focus on an audit of NMLA's case flow and case management processes post intake and internal referral. NMLA has four main practice groups, several other specialty groups, and eight offices across the state. NMLA seeks to standardize and improve its legal service delivery model using more efficient processes and technology. The work will consist of:

- Workflow analysis across NMLA's practice groups and geographic offices as it relates to use of LegalServer and other software use (e.g., calendaring and document management systems)

- Identifying information and processes that could be consolidated in LegalServer or other appropriate applications
- Streamlining of processes related to legal workflow and administrative workflow (e.g., internal approvals)
- Developing a plan for SharePoint implementation and integration with LegalServer
- Developing a plan for LS5 implementation that is coordinated with other processes, IT, and infrastructure improvements
- Provide a report with findings, best practices, and actionable recommendations
  - Include an implementation roadmap with short-term and long-term strategies

### **Preparing your application**

Applications are due no later than:

March 9, 2026, at 5PM MST.

Late Applications will not be accepted

Your application will consist of three (3) parts, to be submitted in the order shown:

1. Cover page (2-page limit)
2. Narrative (4-page limit)
3. Budget (no page limit)

### **Instructions For Cover Page**

Please provide a cover page containing key information about your organization, a summary of your narrative, proposed contract amount, and contact information.

### **Instructions For Narrative**

Please provide a narrative of no longer than four (4) pages with the following details:

- 1) Proposed activities: Describe with details what services will be provided and how you expect to coordinate them.
- 2) Monitoring and Evaluation: What is your proposed detailed project plan, including project activities, dates, deliverables, and meetings with NMLA staff? Will activities be remote or in-person? What benchmarks will be used to assess NMLA's current front-end operational workflow posture? How will you communicate with the NMLA team throughout the project?
- 3) Please briefly describe your history and accomplishments with operational workflow audits and contextual software implementation, specifically in the context of civil legal aid.

### **Instructions For Budget**

Please provide a budget summary and a detailed budget that covers the following.

- Please provide a line-item breakdown of the costs associated with your proposal, including a description of what each line-item would entail.
- Please include an explanation of any costs that a reviewer might question.

### **Questions**

Send any questions by email to Jonathan Hupp, Litigation Director, at jonathanh@nmlegalaid.org

### **Submitting Your Application**

When you have completed all sections of your application, prepare your application for electronic submission. There is one format we will accept:

1. One (1) PDF file
  - a. Please name your file:  
[applicant name] 2026 Full Application

Please send an email with the subject line “[applicant name] 2026 Intake and Case Management Processes Audit” to Jonathan Hupp, Litigation Director, at jonathanh@nmlegalaid.org with your application file(s) attached.