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## **Request for Proposals**

### **Coordinated Intake and Referral System Host**

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**RFP Published:** November 5, 2024

**Questions Due:** November 18, 2024

**Proposals Due:** 5:00 p.m. EDT December 20, 2024

**Interviews:** Week of January 20, 2025

**Host Selected:** February 10, 2025

**Project Kickoff:** Week of March 3, 2025

**Attachments:** Exhibit A: Tasks and Responsibilities Matrix  
Exhibit B: Navigator Job Description  
Exhibit C: Memorandum of Understanding for Pilot

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#### **I. Overview**

The District of Columbia Bar Foundation (“DCBF” or “the Foundation”) is soliciting proposals for a partner organization to operate a Coordinated Intake and Referral (“CIR”) System in DC. This organization is referred to herein as the “CIR host.” As envisioned, CIR is a streamlined process for DC residents to access legal services from more than 50 legal services organizations (“LSOs”) through a single phone number and web site. It does not replace existing intake structures; it supplements them.

The DC Bar Foundation was founded in 1977 with the vision that residents of the District have equal access to justice, regardless of income, education or power. Our mission is to fund, support, and improve legal representation of people who are financially disenfranchised or who are otherwise underserved in the District of Columbia.

Given our vision and mission, the DC Bar Foundation is laser focused on the roughly 13% of the District’s population who live below the poverty line. We have more than 50 legal aid providers throughout the 68 square miles of our city. (To help put this into context, consider

that jurisdictions with a similar number of residents as the District of Columbia, such as Alaska, Vermont, and Wyoming, each have five to seven legal services organizations.) This creates an extraordinarily challenging civil legal aid system for District residents to navigate in moments of crisis.

It is within this context that we have sought to improve coordination among our city's legal providers. In prior efforts, over the course of decades, we attempted to do this through direct grants to legal aid providers. In 2020, we decided to leverage our power as a convenor and funder to lead the effort ourselves. In this spirit, we launched the development of what we call a Coordinated Intake & Referral System. In 2021 collaborated with Neighborhood Legal Services Program of the District of Columbia in the application for a Technology Initiative Grant from the Legal Services Corporation to secure additional financial support for the initiative

CIR is a user-centered system that will allow DC residents to call one phone number (or go to one website) to get help in civil legal matters. As discussed in greater detail below, it is a technology solution designed to integrate with the individual intake systems of DC's legal aid providers. DC residents will tell their story once and then be referred to the most appropriate legal aid provider based on their income and other relevant eligibility criteria.

A pilot program focused on family law matters other than domestic violence began in June 2024 and continues to operate. The Foundation's goal is to expand CIR's coverage to encompass all areas of civil legal aid. We recognize that, from a project management perspective, a phased and well-planned approach is necessary, taking into account all existing opportunities and challenges.

Interested organizations should submit a proposal that presents an innovative and comprehensive CIR expansion strategy. This should include a clear plan for expanding into other areas of law and integrating with existing smaller issue-specific coordinated efforts, such as the Family Law Assistance Network, the Landlord Tenant Legal Assistance Network, the Victims Legal Network of DC, and others.

DCBF will short-list proposals that align with the program's objectives and demonstrate a well-structured, innovative, programmatically feasible, and comprehensive implementation and expansion plan that leverages the expertise that exists within our local legal aid community. These organizations will be scheduled for interviews on one of January 21, January 23 or January 24. Once the CIR host is selected, we will work closely with the selected organization to refine the implementation strategy, ensuring it best serves the program's objectives and meets the needs of DC residents.

## **II. Additional Context**

This section provides additional context for some portions of your Submission. Please see the more detailed instructions in Section III.

### **A. CIR Operation**

LSOs may refer residents from within the CIR portal, residents will have access to a publicized web form, and there will be a phone number that can terminate live calls to the host during business hours or collect and transcribe voice mails after business hours or should the host lines be busy. CIR Navigators, described under the Staffing Requirements below, will handle calls and follow up with contacts that are not able to be handled live following the service levels described below. DCBF will invest in targeted communications to make DC residents aware of CIR as a resource and how to access it.

Residents should be able to connect to the system by phone, e-mail, internet, or walking into one of many resident-facing settings. The host should describe their capacity to support walk-ins and consider how residents walking into other community organizations might be best served. Only incoming voice calls and referrals from participating LSOs have been tested in the pilot, additional development may be required to support the other points of entry. DCBF will fund such development directly through a separate contract with a technology vendor.

### **B. Funding & Eligibility Criteria**

DCBF will dedicate funding from all available resources. However, a significant portion of the Foundation's funding is provided by the DC Council through the Access to Justice Initiative, which limits direct grant funding to provide "support to nonprofit organizations that deliver civil legal services to low-income and underserved District residents, or support to their nonprofit organization partners." Applicants should be aware of these funding limitations.

DCBF anticipates awarding a multi-year grant for the operation of the CIR system subject to the availability of funding and satisfactory program performance.

### **C. Legal Aid Environment**

At launch, the CIR system will not be the only coordinated referral source for DC residents requiring legal aid. Existing efforts include the Family Law Assistance Network, the Landlord Tenant Legal Assistance Network, and the Victims Legal Network of DC. While long-term plans for the various networks do not exist at this time, respondents should develop a strategy to collaborate and communicate with the other referral networks initially and over time as CIR expands its coverage.

#### D. Communications

DCBF has made a significant investment in developing communication materials for the CIR, including a comprehensive brand and messaging strategy created with support from an external marketing and communications partner and in consultation with stakeholders and the local community. The Foundation will make these resources available to the selected CIR host organization and welcomes further input from the host to build on and expand CIR's communication and marketing efforts.

#### E. Available Volume Information

DCBF has evaluated several sources of information to project the volume of inquiries to CIR, including volume during the pilot, other entry points into the District's civil legal aid network, experience from other jurisdictions that have implemented a CIR system, and information gathered from legal service organizations. DCBF has not completed an exhaustive search of potential guidance on volumes but provides the information from selected sources below for consideration.

The Pilot. During the pilot, information about CIR was distributed solely through participating LSOs and also the family law self-help center located in the DC Superior Court. For this reason, it is not possible to estimate call volumes following a rollout that would include broader promotion of the CIR phone number. To drive CIR impact, following an initial baseline period, the selected host should prepare plans to expand both the number of law areas covered as well as the channels through which the CIR contact information will be promoted.

Lawhelp.org/DC. DCBF evaluated information about the ten Lawhelp.org/DC pages with the greatest traffic. Each of these pages has between 2,200 and 5,800 unique visitors each month. At present, there is no mechanism to estimate the potential impact of including the CIR phone number on these pages, so DCBF anticipates working with the host to map out a testing and rollout plan to help lawhelp.org visitors who are ready to connect with an attorney through CIR.

Other Networks. As one point of reference, the Landlord-Tenant Legal Aid Network generally answers about 250 to 350 calls per month and receives another 450-550 voice mail messages out of a total of 2,000 to 2,500 calls per month. This results in approximately 200 referrals to participating LSOs each month.

Respondents should consider this and information from other sources in developing the strategy for expanding areas of law and methods of promotion.

#### F. Transition from the CIR Pilot

Respondents should plan a 30-day transition period, during which the project leads from the pilot will be available to assist the new host in transitioning or setting up the necessary management systems. The Memorandum of Understanding between the pilot host and participating LSOs is attached (Exhibit C) to reflect how the parties came together and aligned themselves to deliver the pilot program. NLSP, the pilot host, has also gathered extensive information and feedback related to design and implementation issues that will be available to inform the CIR Full Launch.

The two Navigators from the pilot will transition to the selected host to ensure continuity and reduce start-up time, and they will be funded through the grant agreement. The Navigators were integral to the pilot evaluation and refinement of the systems and processes. Respondents should describe their approach to leveraging the experience of these personnel along with any issues they foresee incorporating the Navigators into their implementation plans.

#### G. Systems Environment and Technology Requirements

DCBF has funded the development of the web-based CIR portal and will continue to fund on-going refinement of the system in collaboration with the CIR host and other community partners. The host selected through this solicitation will be given access to the existing technologies, including both the CIR portal and related phone system that transcribes voice messages and forwards transcribed messages into the CIR system. The technology vendor who built the CIR portal will build linkages into the case management systems of organizations so that the ultimate referrals will be automated. Initially, however, referrals will be sent via email from the CIR portal to the selected participating LSOs.

The system will provide reporting that will enable the host to track and follow-up on referrals. In the attached performance standards, LSOs are to follow up on and accept or reject a referral in two business days. Leveraging the reporting capability in the CIR system, the host will be expected to monitor compliance with this timeframe. However, the CIR host would need to collaboratively work with DCBF and participating LSOs to continuously improve these protocols.

Since DCBF intends to fund the operation of the portal and phone system directly, the host selected through this solicitation will need to plan for appropriate internet access and computers through which to log into the portal and a phone number to which calls can be directed. Initially, DCBF expects the host to leverage existing technologies (phones, computers, etc.), rather than dedicated equipment. Respondents should describe their anticipated technology requirement in detail in the proposal.

## H. Training

Through the pilot program, training for Navigators has been developed that will be made available to the selected host. It is expected that the host will, at minimum, provide this or substantially similar training. The host may choose to enhance or supplement that training where necessary to ensure Navigators have the appropriate skills to successfully handle CIR inquiries consistent with the staffing requirements described below.

Topics for the pilot included substantive area training, trauma-informed training, racial equity training, and intake best practices. Respondents should consider both initial training as well as continuing education for staff working on CIR, including the intake and referral training resources developed by [Inform USA](#). Training should be in a form that can be easily offered on demand for new staff and potentially for partnering LSOs who may support initial referrals.

## I. Sustainability

DCBF has the capacity to fund the initial rollout of CIR. However, for CIR's long-term success, the host should articulate its strategy to identify and pursue a diversified base of funding to sustain CIR over the long-term. Those efforts should be incorporated into the broader stakeholder engagement activities the host will lead. Sustainability will be dependent on broad stakeholder acceptance of and support for CIR as a critical element in the District's civil legal aid environment.

## J. Staffing Requirements

LSOs participating in the pilot believe there is a risk to privacy and confidentiality if staff with access to other client information also interact with residents interacting with CIR. While some respondents may propose leveraging existing intake personnel to handle the incremental volume of activity from the CIR system, the proposal should describe how any potential risks to privacy and confidentiality will be mitigated.

It should be noted that CIR will be accessed through secure web portals, so the system design is separate from the host's other intake systems. If the proposal is to use shared resources, respondents should explain in the proposal how CIR calls will be handled coming into a shared pool of resources as well as how training will be coordinated with any other training provided to the shared pool. Call handling and intake into the CIR system is to be performed by Navigators, who will:

- Conduct trauma-informed and culturally competent eligibility screenings with people seeking legal assistance.
- Process and make referrals in accordance with agreed upon CIR protocols.

- Monitor the status of case assignments and follow up with legal service organizations regarding the placement of cases.
- Collaborate with the CIR project team, DCBF, and other stakeholders to continuously improve the coordinated intake program processes and technologies.

The host organization will need to assign a member of its senior management team to oversee the program and monitor compliance with program requirements. The host will also convene a group of stakeholders to be agreed upon with DCBF that will provide feedback on program performance and effectiveness as well as input regarding the future direction for CIR. DCBF will participate in any meetings and use feedback gathered to inform program development and any modifications needed to the technology or program design.

#### K. Service Levels

The CIR system will be able to track and report on both host service levels and LSO service levels. The host should monitor performance and be prepared to provide a root cause analysis and corrective action plans for deviations from the agreed upon service levels. Respondents should describe in the proposal how they think about setting, adjusting and monitoring service levels as CIR rolls out initially and then more broadly, working in close collaboration with DCBF. The CIR host would need to collaboratively work with DCBF and participating LSOs to continuously improve these protocols.

#### L. Case Referral Integrity and Accountability

It will be important to ensure that the referral process remains fair, transparent, and free from conflicts of interest, particularly in preventing the assignment of favorable or straightforward cases to the host organization. The host must establish measures that guarantee integrity, fairness, and transparency in case referrals, ensuring that no single entity, including the host, disproportionately receives "good" cases. Clear, equitable protocols for case management must be developed so that all legal service organizations within the CIR system have equal access to cases. Additionally, respondents should outline the mechanisms they will put in place to monitor and address any potential deviations or concerns, ensuring accountability and maintaining trust and fairness that are essential to the success of the CIR system.

#### M. Monitoring and Evaluation

*Pilot Evaluation.* DCBF contracted with a research and evaluation firm to design and conduct an evaluation of the CIR pilot. This study will analyze data to assess the performance and timing of the CIR process steps, such as navigators responding to calls,

completing eligibility screenings, initiating referrals to LSOs (and facilitating second referrals, when necessary), and placing cases with LSOs. The study will also gather feedback from key participants—specifically, CIR navigators, the pilot launch manager, and the pilot participating organizations—to reflect on CIR workflows, including what works well and how protocols can be improved. The evaluation report is expected to be released at the end of January 2025, and the contents are intended to support the new CIR host organization establish optimal protocols based on lessons learned.

*Ongoing Monitoring and Evaluation.* The CIR system is expected to evolve and grow leveraging information and experience from within the District, as well as other innovations and learning from other jurisdictions implementing similar programs. The host organization must work consistently to enhance the CIR service delivery processes for residents, using its own program monitoring data, stakeholder feedback, and national best practices. The selected host will work with DCBF and the Technology Partner to identify and implement system enhancements and is also expected to support ongoing monitoring and evaluation activities that will be performed by DCBF’s research partner, including access to personnel supporting the CIR system.

### **III. Submission Requirements**

#### **A. Timeline for Proposal Process**

DCBF will collect and respond to any questions submitted by potential bidders that are submitted to [innovation@dcbfoundation.org](mailto:innovation@dcbfoundation.org) by November 18, 2024. DCBF will reply on or before December 6, 2024, with original questions and written responses to all who submit questions. Finalists will be notified by January 15, 2025, and they should be prepared to appear for an interview during the week of January 20, 2025. Although actual times may vary, appointments currently being held are January 21 at 3:00 pm, January 23 at 2:00 pm, and January 24 at 2:00 pm. DCBF will identify the selected host by February 10, 2025.

#### **B. Proposal Format**

DCBF requests that respondents provide a technical proposal that lays out how the respondent would approach the staffing, oversight, and support for the CIR system. Suggested page lengths are below. Please note documents should be single-spaced with 1” margins. Specific sections should include:

1. *Executive Summary (1-2 pages)*
  - o Brief overview of the organization and its vision for the CIR Full Launch.



- o Summary of how the organization’s capabilities align with CIR’s goals and objectives.
2. *Organizational Background and Qualifications (1-2 pages)*
- o Overview of the organization’s history, mission, relevant experience, and organizational commitment to racial equity.
  - o Overview of organizational structure, including current capability for communications and marketing.
  - o Description of prior experience in managing legal aid, social services, or similar coordinated referral programs.
  - o Key personnel and their qualifications, focusing on roles relevant to CIR Program-preferably a CIR program organization chart.
3. *CIR Full Launch Implementation Management Plan (5-10 pages)*
- o Detailed strategy for implementing CIR’s objectives, including intake, referral, and tracking processes, including approach to transition from the pilot.
  - o Describe how racial equity will be addressed with the design approach and implementation plans.
  - o Proposed approach for expanding CIR beyond its current pilot focus on family law (excluding domestic violence) to additional areas of law.
  - o Proposed approach to collaboration with existing smaller, issue-specific referral networks.
  - o Proposed approach to integrating CIR with existing smaller issue-specific referral networks.
  - o Proposed mechanism for formalizing and supporting the participation of Legal Service Organizations (LSOs) in the CIR program, specifically those that will be receiving and sending referrals to CIR.
  - o Timeline of major project milestones and deliverables for the first year of CIR Full Launch.
4. *DC Resident Engagement and Outreach Strategy (3-5 pages)*
- o Plans for community outreach and engagement, including specific strategies for reaching underserved and target populations.
  - o Approach to onboarding and on-going training of and support to LSOs receiving referrals.

- o Proposed methods for partnering with community-based organizations to raise CIR's visibility.
  - o Proposed methods for partnering with DCBF and its external communications partner to raise public awareness and program visibility.
5. *Case Referral and Intake Management (3-5 pages)*
- o Outline of protocols to ensure equitable and transparent case referrals among participating legal service organizations.
  - o Measures to prevent potential conflicts of interest (e.g., protocols for avoiding preferential referral practices).
  - o Accountability and monitoring processes to ensure fairness and transparency.
6. *Technology and Data Management (1-2 pages)*
- o Strategy for managing CIR's technology platform, including case management, data entry data tracking.
  - o Plans for ensuring data privacy, security, and compliance with relevant regulations.
  - o Approach to coordinating with CIR's technology provider for system enhancements and troubleshooting.
7. *Evaluation and Reporting (1-2 pages)*
- o Methods for measuring CIR's success against agreed-upon metrics, including tracking intake volumes, referral outcomes, and community satisfaction.
  - o Proposed frequency and format for reporting progress to DCBF and other stakeholders, ensuring transparency in program implementation.
  - o Approach to collaborating with evaluation consultants or external evaluators, as needed.
8. *Proposed Budget and Financial Plan (3-5 pages)*
- o Detailed budget for the CIR Full Launch, including staffing, equipment, supplies, marketing, and other supporting costs.
  - o Justification for major expenses and any assumptions made in developing the budget.
  - o Financial sustainability plan for CIR's long-term viability and potential funding sources beyond DCBF.

9. *Collaboration and Communication Plan (2-3 pages)*

- o Approach to collaborating with DCBF, participating LSOs, technology and communication service organizations, and other key stakeholders, including regular check-ins and communication channels.
- o Describe current organizational capacity for communications and marketing, and strategy to raise awareness and build partnerships focusing on underrepresented and historically marginalized communities.
- o Proposed strategies for ensuring a collaborative approach to marketing, community engagement, and branding, in line with CIR's message and brand guidelines.
- o Outline of how the organization will coordinate with CIR's network partners, such as the Family Law Assistance Network, Victims Legal Network of DC, Landlord Tenant Legal Assistance Network, and other smaller issue-specific networks
- o Use stakeholder engagement mapping and management tools to demonstrate how you will effectively engage and track the interests, influence, and involvement of stakeholders in the CIR program.

10. *Risk Management and Contingency Plans (2-5 pages)*

- o Identification of potential risks to the successful implementation of CIR and proposed mitigation strategies.
- o Contingency plans for addressing unexpected challenges, including staffing changes, technology issues, or funding constraints.

11. *Appendices*

- o Relevant supporting materials, including resumes of key personnel, organizational charts, past performance references, and any additional documents supporting the proposal.

C. Submission Details & Evaluation Criteria

Interested organizations are encouraged to propose an innovative and comprehensive model/approach for implementing the CIR Program Full Launch in their submitted proposals. DCBF will select the proposal it believes will achieve the CIR program objectives most effectively. After selection, DCBF will collaborate with the chosen organization to fine-tune the implementation plan.

Please submit proposals in PDF format to [innovation@dcbfoundation.org](mailto:innovation@dcbfoundation.org) before 5:00 p.m. EDT on December 20, 2024. Pages should be formatted with single-line spacing with 1" margins.

DCBF will finalize selection of the host organization for the Full Launch of the CIR system by the week of February 3, 2025, with an anticipated project kickoff date no later than March 3, 2025.

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Thank you for your interest in DC's Coordinated Intake & Referral System.

## EXHIBIT A

### Tasks and Responsibilities Matrix

The table below provides a breakdown of the tasks and responsibilities for the CIR (Coordinated Intake and Referral) implementation, divided between the DC Bar Foundation (DCBF), CIR Technology Partner organization (TP), and the CIR Host Organization (HO):

Updated: November 5, 2024

Tasks and Responsibilities	DC Bar Foundation (DCBF)	Technology Partner/Vendor (TP)	CIR Host Organization (HO)
1) CIR System and Data Management	<ul style="list-style-type: none"> <li>• Maintain ownership and control of the CIR database and its underlying architecture.</li> <li>• Manage and oversee the work of external TP responsible for the CIR system's development and maintenance.</li> <li>• Directly or through its TP, perform regular audits and reviews of the data to ensure its accuracy and integrity.</li> <li>• Through TP, implement security measures to protect the CIR database from unauthorized access, breaches, or data loss.</li> <li>• Ensure compliance with all relevant data protection laws and regulations in building</li> </ul>	<ul style="list-style-type: none"> <li>• With inputs from HO, ensure that the technological infrastructure of the CIR system remains up to date, including enhancement, upgrades, and maintenance, to ensure it meets the needs of all users.</li> <li>• In consultation with HO define who has access to different levels of data within the HO, limiting access based on role and necessity.</li> <li>• Technology Partner (TP) provides clear protocols and standards for data entry, including validation rules and error-checking mechanisms.</li> <li>• Organize training and provide resources to the</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure accurate and timely data collection and entry into the CIR database following established protocols.</li> <li>• Ensure that data entry and management are performed in accordance with the DCBF guidelines and policies.</li> <li>• Set and enforce policies on data access, usage, and retention, ensuring compliance with relevant laws, regulations, and DCBF policies.</li> <li>• Provide basic IT support to staff using the CIR system, escalate complex issues to the Technology Partner (TP), and keep DCBF informed throughout the process.</li> <li>• Regularly review the data management processes and provide feedback on areas for improvement, including challenges encountered or suggestions for enhancements.</li> <li>• Work collaboratively with DCBF and its TP as well Participating Organizations (POs) to implement updates and improvements in the systems and data management processes.</li> <li>• Update protocols and training materials as needed to adapt to changing circumstances or new procedural requirements.</li> </ul>

Tasks and Responsibilities	DC Bar Foundation (DCBF)	Technology Partner/Vendor (TP)	CIR Host Organization (HO)
	<p>security measures in the CIR database.</p> <ul style="list-style-type: none"> <li>Through its technology partner, conduct regular security audits and updates to maintain the integrity and security of the database.</li> </ul>	<p>HO to maintain high data quality standards.</p> <ul style="list-style-type: none"> <li>In consultation with TP DCBF and HO, set protocols for data sharing with third parties, including anonymization and consent requirements.</li> <li>Work closely with HO and DCBF to establish confidentiality agreements and data disclosure policies in the CIR system that align with legal requirements and ethical standards.</li> </ul>	<ul style="list-style-type: none"> <li>Design and conduct regular training sessions for the CIR team and POs to ensure ongoing compliance and efficiency.</li> <li>Take responsibility for accurate and timely data entry into the CIR database.</li> <li>Implement internal checks and processes to ensure data integrity and minimize errors.</li> <li>Report any discrepancies or issues with data accuracy to the DC Bar Foundation promptly.</li> <li>Adhere to all confidentiality and data disclosure policies set by the DC Bar Foundation.</li> <li>Control and monitor access to sensitive data, ensuring that only authorized HO personnel can view or modify such information.</li> <li>Train staff in the importance of maintaining client confidentiality and the proper handling of sensitive information.</li> <li>Ensure that any data shared with third parties is approved by DCBF and complies with the DCBF policies and legal obligations.</li> <li>Compliance with the data security and privacy standards set by DCBF and/or its TP as well as applicable regulations.</li> <li>Report any security incidents or breaches immediately to DCBF.</li> <li>Ensure that all staff involved in CIR operations are trained in data security best practices.</li> </ul>
2) Program Implementation Management	<ul style="list-style-type: none"> <li>Provide sufficient funding and release monthly/quarterly payments to HO in a</li> </ul>	<ul style="list-style-type: none"> <li>Provide regular troubleshooting and development of the CIR system to ensure it can</li> </ul>	<ul style="list-style-type: none"> <li>Manage the daily intake and referral processes, ensuring clients are efficiently connected to appropriate services.</li> </ul>

Tasks and Responsibilities	DC Bar Foundation (DCBF)	Technology Partner/Vendor (TP)	CIR Host Organization (HO)
	<p>timely manner and according to the agreement to ensure smooth program implementation.</p> <ul style="list-style-type: none"> <li>• Provide financial oversight and ensure proper utilization of resources.</li> <li>• Provide overall guidance and support to the HO team on matters related to CIR program implementation, project management best practices, and stakeholder communication and engagement.</li> <li>• Assist the HO in addressing program issues and risks.</li> <li>• Provide financial and technical support necessary for continuous improvement of the CIR systems and operational processes of the CIR program.</li> </ul>	<p>handle the growing workload and effectively meet the needs of clients, navigators, and participating LSOs.</p> <ul style="list-style-type: none"> <li>• Attend weekly coordination meeting between HO, DCBF CIR Program Manager, and HO CIR Project Manager.</li> </ul>	<ul style="list-style-type: none"> <li>• Handle client interactions, data entry, and follow-ups with POs and within the CIR database.</li> <li>• Recruit, train, and supervise staff responsible for CIR implementation.</li> <li>• Ensure that HO staff and intake personnel of the POs are fully trained on CIR protocols and the use of the CIR database.</li> <li>• Implement quality assurance measures to ensure high standards of service delivery.</li> <li>• Ensure compliance with legal and ethical standards, including data protection and client confidentiality.</li> <li>• Submit timely invoices and other financial information to DCBF required as per the terms of the agreement.</li> <li>• Conduct outreach to the community and partner organizations to raise awareness of the CIR program and improve collaborations.</li> <li>• Collaborate with other legal aid and social service provider organizations and community partners to ensure comprehensive service coverage.</li> <li>• Gather and analyze feedback from clients and partners to improve CIR processes.</li> <li>• Propose and implement improvements to the CIR operational processes and system based on feedback and performance data.</li> <li>• Collaborate on the continuous development and improvement of the CIR program, adapting to changing needs and circumstances.</li> <li>• Share and document lessons learned and best practices with POs and DCBF to</li> </ul>

Tasks and Responsibilities	DC Bar Foundation (DCBF)	Technology Partner/Vendor (TP)	CIR Host Organization (HO)
			<p>enhance the overall effectiveness of the CIR program.</p> <ul style="list-style-type: none"> <li>• Present workaround and mitigation strategies for arising issues and risks.</li> <li>• Monitor and track the budget to ensure program viability and report to DCBF any changes in costs and program spending.</li> <li>• HO CIR Project Manager to attend weekly coordination meeting between HO, DCBF CIR Program Manager, and TP.</li> </ul>
<p>3) Program Monitoring, Evaluation, and reporting</p>	<ul style="list-style-type: none"> <li>• Define the reporting requirements, including frequency, format, and specific metrics that need to be tracked.</li> <li>• Conduct periodic monitoring visits to check the data quality and interview with clients, Navigators, and other project team members to ensure the CIR program is heading in the right direction and ensure the program meets its goals and objectives.</li> <li>• Establish evaluation criteria for assessing the CIR program's performance, outcomes, and impact.</li> <li>• Hire external evaluators to conduct</li> </ul>	<ul style="list-style-type: none"> <li>• Build into the CIR system tools or templates for data reporting to ensure consistency and accuracy in reports generated by the HO.</li> </ul>	<ul style="list-style-type: none"> <li>• Continually and systematically monitor intake and referral operational processes to track the program's progress, results, gaps, issues, and risks.</li> <li>• Monitor and report on customer feedback and case processing times, including time taken in different steps of the referral process, using features such as client intake forms, referral tracking, and data analytics built into the CIR system.</li> <li>• Collect and analyze program performance data (quantitative and qualitative), and submit quarterly reports to DCBF detailing progress, results, gaps, issues, and risks.</li> <li>• Ensure that reports are accurate, comprehensive, and submitted on time.</li> <li>• Collaborate with DCBF and its TP on any custom reporting needs or data analysis projects.</li> </ul>



Tasks and Responsibilities	DC Bar Foundation (DCBF)	Technology Partner/Vendor (TP)	CIR Host Organization (HO)
	<p>periodic in-depth assessments of the intake and referral operational processes, team capacity, program outcomes, and client and POs' experience.</p> <ul style="list-style-type: none"> <li>• Share reports with HO produced by external evaluators on the CIR program.</li> <li>• Review and approve CIR-related reports before dissemination by HO to stakeholders.</li> </ul>		
<p>4) CIR Steering Committee/ Core Program Team Meeting</p>	<ul style="list-style-type: none"> <li>• Organize and lead weekly/biweekly CIR Program Core Team meetings, including compiling the agenda and circulating meeting notes.</li> </ul>	<ul style="list-style-type: none"> <li>• Participate in weekly/biweekly CIR Program Core Team meetings and provide updates on matters related to CIR technology.</li> </ul>	<ul style="list-style-type: none"> <li>• Assist the DCBF CIR Program Manager with planning meeting activities, including the preparation of agenda items and meeting notes.</li> <li>• Ensure the HO's CIR Project Manager and other relevant team members attend the CIR Program Core Team meetings regularly.</li> <li>• Provide regular weekly/biweekly updates on the CIR program, including progress, issues, potential risks and mitigation strategies.</li> </ul>
<p>5) Hiring of the project team and their training and capacity building</p>	<ul style="list-style-type: none"> <li>• Provide overall guidance to HO on hiring criteria, ensuring alignment with the CIR program's objectives and performance standards.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide inputs to the hiring processes as necessary.</li> <li>• Provide training on CIR technology to Navigators, members of participating LSOs, and other CIR project personnel</li> </ul>	<ul style="list-style-type: none"> <li>• Staff Recruitment: Lead the recruitment, selection, and hiring of qualified Navigators and other required project personnel for the CIR program, following the criteria provided by DCBF.</li> <li>• Training and capacity building: ensure that all new hires undergo the required training and are proficient in CIR protocols and systems.</li> </ul>

Tasks and Responsibilities	DC Bar Foundation (DCBF)	Technology Partner/Vendor (TP)	CIR Host Organization (HO)
			<ul style="list-style-type: none"> <li>• Ongoing Capacity Building: Monitor the performance and capacity of the CIR project team and facilitate continuous learning and capacity building for the team. HO also identifies areas where additional training and coaching are needed and coordinates with DCBF to address these needs.</li> </ul>
<p>6) Coordination with Participating Organizations (PO)</p>	<ul style="list-style-type: none"> <li>• Provide input and support the HO's efforts in developing an overarching communication and stakeholder engagement strategy for the CIR program.</li> <li>• Maintain high-level relationships with key stakeholders, including major funders, DC Courts, DC Council, and key legal and social service organizations.</li> <li>• Support the HO's efforts in onboarding new participating organizations by facilitating initial communication and engagement.</li> <li>• Provide guidance and support on best practices for effective</li> </ul>	<ul style="list-style-type: none"> <li>• Establish integration between CIR System and Participating Organizations' case management systems.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop an overarching communication and stakeholder engagement strategy for the CIR program.</li> <li>• Manage regular day-to-day communication with participating legal and social service provider organizations.</li> <li>• Ensure timely and effective referrals and follow-up with participating organizations.</li> <li>• Coordinate with participating organizations to address any issues related to the referral process or case management.</li> <li>• Facilitate regular meetings or check-ins with participating organizations to ensure smooth operations and address any concerns, issues, and risks.</li> <li>• Collect feedback from participating organizations on the effectiveness of the referral process and communication.</li> <li>• Report any issues or significant feedback to the DCBF and collaborate on potential solutions.</li> <li>• Design and provide necessary training and support to participating organizations on the CIR system and referral process.</li> <li>• Address any questions or issues related to the use of the CIR system and data management.</li> </ul>

Tasks and Responsibilities	DC Bar Foundation (DCBF)	Technology Partner/Vendor (TP)	CIR Host Organization (HO)
	<p>communication and collaboration.</p> <ul style="list-style-type: none"> <li>• Monitor and evaluate the effectiveness of communication strategies and practices of the CIR program.</li> <li>• Collect and review feedback from participating organizations on the communication processes.</li> <li>• Use this feedback to inform strategic adjustments and improvements in communication policies.</li> </ul>		<ul style="list-style-type: none"> <li>• Maintain records of communications, referrals, and interactions with participating organizations.</li> <li>• Ensure that documentation is up-to-date and accessible for review by the DCBF auditors, monitoring teams, and evaluations. Collaborative Problem Solving:</li> <li>• Work with DCBF to address any systemic issues or challenges that arise in the referral and communication processes.</li> <li>• Regularly review and update communication practices to ensure they remain effective and aligned with the program's goals and changing circumstances.</li> <li>• Share insights and best practices between participating organizations to enhance overall communication and collaboration within the CIR program.</li> </ul>

## EXHIBIT B

# COORDINATED INTAKE AND REFERRAL NAVIGATOR

CIR is a streamlined process for DC residents to access legal aid through a single phone number or website. It does not replace existing intake structures; it supplements them. Users will have the option to call a number or go to a website. The Navigators will speak with users and will ask questions to understand the issue. From there, the Navigators will connect the user with the appropriate provider. The Navigators will utilize an online database system of DC legal aid providers, including contact information, areas of service, and eligibility criteria.

## DUTIES & RESPONSIBILITIES

- Conduct trauma-informed eligibility screenings with people seeking legal assistance.
- Identify applicants' legal needs and assign cases to the appropriate legal services organizations.
- Utilize the coordinated intake system software to process intakes and make case assignments.
- Monitor the status of case assignments and follow up with legal services organizations and applicants as appropriate.
- Provide legal information and resources to applicants.
- Communicate with legal services organization staff regarding the placement of cases.
- Maintain and update information about legal services organizations and legal resources in the coordinated intake system software.
- Collaborate with the project team and stakeholders to continuously improve the coordinated intake program processes and technologies.

## QUALIFICATIONS

The ideal candidate will have the following:

- Excellent problem solver with sound judgment and the ability to meet adversity with tenacity.
- Good written and verbal communication skills.
- Good organizational skills and ability to track tasks that require longer-term follow-up.
- Commitment to a user-centered approach centered in compassion and confidentiality.
- Working proficiency or fluency in a target language (Spanish, Amharic).
- Knowledge of the DC civil legal services sector.
- Experience conducting intake.
- Experience providing navigation services to community members (i.e. legal or medical settings).
- Lived experience navigating legal and/or social services, particularly in DC.
- Customer service experience, particularly via phone.

## EXHIBIT C

### **Coordinated Intake and Referral Pilot Program Memorandum of Understanding**

This is a Memorandum of Understanding and Agreement ("Agreement") by and between Amara Legal Center, Asian Pacific American Legal Resource Center, DC Affordable Law Firm, DC Bar Pro Bono Center, DC Volunteer Lawyers Project, Neighborhood Legal Services Program, DV LEAP (a project of Network for Victims Recovery of DC), Mother's Outreach Network, Legal Aid DC, and Whitman-Walker (collectively known as the "Parties"), effective upon the date of signature, to ensure that all parties fully understand their obligations for participation in the CIR Pilot Program.

#### I. Scope of Work

Coordinated Intake and Referral ("CIR") is a streamlined process for DC residents to access legal services through a single phone number and/or website. It does not replace existing intake structures; it supplements them. Since 2020, partner organizations have been planning and working with community members and other stakeholders to launch the CIR, with a goal date of late 2024. The CIR is ready to begin pilot testing phase ("pilot"). The pilot will focus on targeted family law subject areas, such as custody, child support and divorce. The goal of the pilot is to test proposed protocols and technology developed specifically for CIR. The pilot will begin accepting client referrals on July 8, 2024, and is anticipated to last until September 27, 2024; however, this is subject to amendment based on lessons learned during the pilot.

#### II. Parties, Roles and Responsibilities

*Parties and Roles* (each LSO can add whatever verbiage they want to describe their org)

- Amara Legal Center — Participant organization
- Asian Pacific American Legal Resource Center (APALRC) — Participant organization
- DC Affordable Law Firm (DCALF) — Participant organization
- DC Bar Pro Bono Center - Participant organization
- DC Volunteer Lawyers Project (DCVLP) — Participant organization
- Neighborhood Legal Services Program (NLSP) — Pilot host (manages pilot program which includes overseeing and hiring CIR Pilot Navigator) and Participant Organization.
- DV LEAP (a project of Network for Victims Recovery of DC (NVRDC)) — Participant organization
- Mother's Outreach Network — Participant organization
- Legal Aid DC — Participant organization
- Whitman-Walker — Participant organization

*Responsibilities*

- CIR Pilot Navigator (Navigator)

- Conduct trauma-informed and culturally competent eligibility screenings with people seeking legal assistance.
- Process and make referrals in accordance with protocols.
- Monitor the status of case assignments and follow up with participant organizations regarding the placement of case(s).
- Collaborate with the project team and stakeholders to continuously improve the coordinated intake program processes and technologies.
- Pilot Host (Host)
  - Hire, train and supervise two CIR Pilot Navigators.
  - Responsible for the management and day-to-day operations of the CIR Pilot.
- Pilot Participant Organizations
  - Consider referrals in accordance with protocols provided in the CIR Pilot Handbook
  - Have at least one designated contact person for the organization that will ultimately be responsible for communication with the Navigators
  - Provide timely updates of organization capacity and priorities to the Pilot Host
  - Provide outcomes and requested information within the CIR System to the Pilot Host

### III. Data Sharing and Confidentiality

#### *Data Sharing*

- Pilot Participant Organizations understand and agree that information entered into the CIR System will be used for the purposes of evaluating the pilot launch of the CIR to inform future improvements.
- As part of the evaluation, Pilot Participating Organizations may be asked to participate in focus groups to provide feedback on their experience with the CIR Pilot and to provide specific administrative data elements from their organizational case management systems. These data elements will consist of aggregated data (e.g., monthly call volume) that would not include client identifying information.

#### *Confidentiality and Privilege*

Any communication between Navigators, Pilot Participating Organizations, and/or the Host Organization (and any information contained in these communications), whether oral or written, relating to applicants for legal services, the nature and facts of their legal matter, and the potential placement of their cases, shall be privileged and confidential, per DC Code § 4-1705.

### IV. General Provisions

- All Parties understand and agree that to make the CIR Pilot a success, each Party must meet their obligations listed above.
- All Parties understand and agree to comply (and ensure compliance with) all ethical guidelines contained in the DC Rules of Professional Conduct.
- All parties will maintain their own malpractice and other forms of insurance.

- All Parties understand and agree that this is a true pilot and the procedures and systems being tested are experimental. The Parties understand that questions, misunderstandings or complaints may arise when testing broad-based impact systems. As such, the Parties agree to fully, openly and productively communicate regarding issues, suggestions and ways to improve the CIR. All Parties will approach communications with one another in good faith, with a growth mindset, and assume best intentions.
- This Agreement contains the entire agreement among the parties regarding the CIR Pilot Project. The Parties to this agreement have had the opportunity to review and comment on all proposed addendums that shall become part of this agreement. Any addendums and modifications to this Agreement, to be effective, must be in writing and signed by all the parties.
- Any Party to this Agreement may terminate their participation by giving written notice of their intent to terminate to each of the Parties. However, the termination of participation of this Agreement by one Party will not alter the terms or obligations of the other remaining Parties to this Agreement.

This Agreement does not alter or amend any other previous contracts between the Parties, nor does it affect any other obligations under any other contracts between the Parties and third parties.

- Each Pilot Participating Organization agrees to the following inclusion and non-discrimination guidelines: No staff, volunteer, or agent affiliated with Member shall discriminate on the basis of race, color, religion, national origin, sex, age, marital status, personal appearance, sexual orientation, gender identity, gender expression, family responsibilities, political affiliation, disability, military status, genetic information, source of income, place of residence or business, status as a victim of an intra-family offense, or credit information in any of its activities or operations. These activities include, but are not limited to, hiring and firing of staff, selection of volunteers, client interaction, and provision of services.

#### V. No rights Created

This agreement does not, and shall not be construed to create any rights, substantive or procedural, enforceable at law by any person in any matter, civil or criminal.

#### VI. Liability

Each Participating Organization is responsible for its own conduct under this MOU and retains all defenses, including immunities, available under federal and District of Columbia law.

#### VII. No Third-Party Beneficiary

This MOU shall not, and is not, intended to benefit or to grant any right or remedy to any person or entity that is not a party to this MOU.

We, the undersigned, have read and agree with this MOU in its entirety.