



## **MID-MISSOURI LEGAL SERVICES CORPORATION**

**117 NORTH GARTH AVENUE  
COLUMBIA, MISSOURI 65203**

**Phone: (573) 442-0116**

**Fax: (573) 875-0173**

**Kirsten F. Dunham, Executive Director**

**[dunhamk@mmls.org](mailto:dunhamk@mmls.org)**

---

---

**REQUEST FOR PROPOSALS**  
**Automated Scheduling and Document Sharing Implementation**  
**for Technology Innovations Grant**  
**Mid-Missouri Legal Services**

**RESPONSE DEADLINE: Friday, October 11, 2024**

Mid-Missouri Legal Services is seeking bids from qualified vendors to implement automated scheduling for intake appointments and document sharing system for intake applicants for MMLS's "Integrated Appointment Scheduling and Document Sharing Systems for Intake" project funded by Legal Services Corporation Technology Innovations Grant.

### **Background**

Mid-Missouri Legal Services (MMLS) is a non-profit legal aid organization providing free legal services in civil matters to low-income people, domestic and sexual violence survivors, and other vulnerable populations in central Missouri. MMLS seeks to expand access to justice despite the encumbrances of poverty. MMLS serves low-income individuals in 11 central Missouri counties. MMLS is a small organization with 20 staff including ten attorneys and four intake specialists/legal assistants. MMLS has its main office in Columbia with a satellite office in Jefferson City. MMLS has historically conducted all intake applications over the phone and is currently launching online intake as a part of our recent transition to the Legal Server Case Management System. Currently a person who calls MMLS seeking legal assistance is placed on a call-back list, and the intake staff call applicants in the order in which they were placed on the list. Online intakes also require follow-up phone calls to complete the application. Intake staff often have to make multiple attempts to reach an applicant and often they cannot reach the person. Staff currently try to accommodate applicants who request a call-back on their work break or other times they are available, but staff do not have a scheduling system and are not able to accommodate every person's requests. The Intake and case acceptance process is also delayed by the applicants' failure to provide documents necessary to assess the case, and clients drop-off and never receive services when they fail to return signed retainers and other forms once their case is accepted.

### **Project Goal and Objectives**

The Project Goal is to increase access to prompt legal services by implementing an automated scheduling system for intake applications and a document sharing solution to address problems

with the current callback system and streamline the process of collecting and sharing documents for case review and client acceptance.

MMLS has completed its first objective to conduct process mapping to identify barriers and improvements in intake workflow.

The project objectives that are the subject of this RFP are to:

- Implement automated scheduling for online intake appointments.
- Implement automated scheduling for phone intake appointments.
- Implement document sharing system for applicants.

The final project objective is to evaluate project implementation and outcomes. MMLS is seeking vendors to perform evaluation in a separate RFP and activities will occur at the same time as implementation of the automated scheduled and document sharing technology.

The results of the BPI mapping include findings that “The callback list can average between 70-100 people long with time of surge as well” and “Intake specialists indicate that less than 50% of the callback list picks up the phone when they are called.” Recommendations to address these inefficiencies include implementation of automatic scheduling software that will allow applicants to control the timing of when they will complete their application, which will provide a more efficient experience for applicants and a more predictable schedule for MMLS staff. A secure, easy-to-use, document sharing and e-sign system will allow applicants to more easily share documents required for case assessment and sign documents necessary to retain MMLS legal services. The project will remove barriers for applicants and the increased efficiencies will free up intake staff time to complete more applications. Particular attention will be paid to making the automated scheduling and document sharing systems safe for survivors of domestic and sexual violence and accessible for people with disabilities.

Project Goals and Objectives are included as Appendix I. The Business Process Improvement Report is available on request.

### **Summary of Services Requested**

MMLS is seeking bids from vendors with experience in technology solutions for intake and knowledge of legal aid to implement automated scheduling for online and phone appointments, and implement document sharing system for applicants.

#### **A. Implementation**

- Based on the gathered requirements, design the architecture and user interface of the automated scheduling system and document sharing solution.
- Identify and implement solutions for barriers in MMLS’ intake system and provide the technical assistance necessary to integrate automatic scheduling software into MMLS’ online intake, VOIP phone system, and Outlook or Legal Server calendar.
- Identify and implement solutions for safe, secure, accessible document sharing and provide coding and technical assistance necessary to implement document sharing software.

- Provide expertise on designing solutions that are accessible to people with disabilities both in terms of language access/comprehension and access for people using screen readers and other assistive technology.
- Customize the solution to meet the specific needs of Mid-Missouri Legal Services.
- Engage community members in pilot tests to evaluate the effectiveness and accessibility of identified solutions.

#### B. Test & Quality Assurance

- Conduct comprehensive testing of the automated scheduling system and document sharing solution to ensure its functionality, reliability, and security.
- Perform user acceptance testing with selected stakeholders to validate the solution's usability and effectiveness.
- Address any issues or bugs identified during testing and ensure they are resolved in a timely manner.
- Based on feedback from pilot tests, implement the identified solutions
- Provide training sessions to key staff members on how to use the new system effectively, including scheduling appointments, managing documents, and generating reports.
- Document and provide report on implementation, testing, specifications of automated calendaring and document sharing solutions, and recommendations on steps MMLS needs to take to sustain the new system.

#### **Qualifications**

- Experience working with legal aid organizations on automated scheduling and document sharing systems.
- Experience with and knowledge of telephone systems, intake call flows, and online intake.
- Knowledge of work flows and tools and experience with implementing organizational change.

#### **Deliverables**

- Documentation of process workflow from online intake and telephone intake to appointment scheduling; and workflow from document requests to case acceptance.
- Documentation and reports (periodic and final) on implementation, testing, specifications of automated scheduling and document sharing solutions, and recommendations on steps MMLS needs to take to sustain the new system.
- Training and training materials for staff on new automated scheduling and document sharing systems.
- Written instructions for users of document sharing system for applicants.

#### **Anticipated Timeline**

RFP Released: September 9, 2024

Deadline for questions from potential bidders: September 30, 2024

MMLS Response to questions: October 3, 2024

Bid Submissions due: October 11, 2024

Review and selection process: October 14-23, 2024

Work begins: end of October 2024  
Project deliverables completed by April 30, 2024

### **Proposal Information**

- How you will conduct the implementation of automated scheduling and document sharing system and provide the deliverables outlined above.
- Your qualifications, including your experience implementing similar projects at other legal aid organizations.
- List the consultants who will work on the project and describe their experience.
- An estimated timeline and amount of time to complete the automated scheduling and document sharing implementation and testing outlined above.
- The all-inclusive fee for the work you will perform to implement and test automated scheduling and document sharing systems as described above, with detailed information about what expenses will be covered under each cost and any variable expenses such as travel reimbursement.

The available budget for contract services for implementation and testing of automated scheduling and document sharing systems is \$27,000-33,000.

### **How to Apply**

Please submit your proposal to Mid-Missouri Legal Services by close of business Friday, October 11, 2024. After all bids are received, they will be considered by the full Board of Directors. MMLS reserves the right to reject incomplete or non-responsive proposals.

Please mail or email proposals to:

Kirsten Dunham, Executive Director  
Mid-Missouri Legal Services  
117 N. Garth  
Columbia, MO 65203  
[dunhamk@mmls.org](mailto:dunhamk@mmls.org)

## Appendix I

### Mid-Missouri Legal Services

**Project Goal:** Increase access to prompt legal services by implementing an automated scheduling system for intake applications and a document sharing solution to address problems with the current callback system and streamline the process of collecting and sharing documents for case review and client acceptance.

**Objective 1: Conduct process mapping to identify barriers and improvements in intake workflow - COMPLETED.**

Milestones:

1. Issue RFP and select business process improvement (BPI) mapping facilitator.
2. Hold kickoff meeting with BPI facilitator to plan process mapping.
3. Complete process mapping of current intake workflow with BPI facilitator and MMLS staff.
4. Conduct focus groups and interviews with intake staff, applicants/clients, and referral partners.
5. Receive report from BPI facilitator summarizing findings, metrics on current performance, and recommended solutions.
6. Develop presentation on BPI process and findings to share with other legal aid organizations.

**Objective 2: Implement automated scheduling for online intake appointments.**

Milestones:

1. Issue RFP and select technology contractor.
2. Map process workflow from online intake to appointment scheduling.
3. Develop and test automated scheduling system for online intakes.
4. Integrate online intake with automated scheduling system.
5. Train staff on using new online intake scheduling system.
6. Conduct user acceptance testing.
7. Collaborate with other legal aid organizations implementing similar online intake scheduling.

**Objective 3: Implement automated scheduling for phone intake appointments.**

Milestones:

1. Issue RFP and select technology contractor.
2. Map process workflow from phone intake to appointment scheduling.
3. Develop and test automated scheduling system for phone intakes.
4. Integrate phone intake with automated scheduling system.
5. Train staff on using new phone intake scheduling system.
6. Conduct user acceptance testing.
7. Collaborate with other legal aid organizations implementing similar phone intake scheduling.

**Objective 4: Implement document sharing system for applicants.**

Milestones:

1. Issue RFP and select technology contractor.
2. Map workflow from document requests to case acceptance.
3. Develop and test document sharing and e-signature system.
4. Integrate document sharing system with case management system.

5. Create instructions for applicants on using system.
6. Train staff on new document sharing system.
7. Conduct user acceptance testing.
8. Share lessons learned on document sharing system in toolkit for other legal aid organizations.

**Objective 5: Evaluate project implementation and outcomes – SUBJECT OF SEPARATE RFP.**

Milestones:

1. Issue RFP and select external evaluator.
2. Finalize evaluation plan and data collection methods with evaluator.
3. Collect baseline data on intake performance before changes.
4. Collect implementation data throughout project.
5. Analyze outcomes data after changes implemented.
6. Create evaluation report summarizing findings.
7. Present evaluation findings at conferences and in toolkit.