

**Request for Proposal
Evaluator for Montana Forms Overhaul TIG**

We will consider all responses that are sent to RFP Coordinator Linden Howard-Murphy (lhoward@mtlsa.org) by 5:00 pm MST on January 24, 2025. Please include the name of the project, “Evaluator for MT Forms Overhaul TIG” in the subject line. No unsolicited emails or calls will be accepted related to this proposal. All communication concerning this Request for Proposal must be directed to lhoward@mtlsa.org. Any oral communications will be considered unofficial and nonbinding on MLSA. Only written statements issued by the RFP Coordinator may be relied upon.

PROJECT SUMMARY

The Montana Legal Services Association (MLSA) is requesting proposals from experienced evaluation consultants who specialize in working with projects funded by the Legal Services Corporation (LSC) for an evaluation of the Montana Forms Overhaul project. A familiarity with technology platforms and LSC Technology Initiative Grants (TIGs) is required. The consultant will evaluate MLSA’s Forms Overhaul TIG Project and advise MLSA and the selected developer(s) regarding data collection and client engagement best practices throughout the course of the project.

This project is funded by a Technology Initiative Grant from the Legal Services Corporation. The Project Description from MLSA’s Forms Overhaul TIG application is included as Attachment 1. A list of forms to be reviewed and updated is included as Attachment 2.

WHO WE ARE

MLSA is a law firm that empowers low-income people by providing legal information, advice, and other services free of charge. MLSA works both on individual cases and under a systemic approach to help low-income people escape domestic violence, keep their housing, preserve their public benefits, protect their finances, and more. MLSA is the only provider of free civil legal services in the state of Montana.

EVALUATOR OBJECTIVES

- The evaluator will develop and execute an evaluation plan in consultation with MLSA for approval by LSC.
- Develop and conduct methods to measure the effectiveness of the automated forms and improve project quality.
- Draft the final evaluation report, including:
 - Assessment of project activities and whether they were conducted as planned or were changed, who conducted the activities, what resources were used to conduct the activities and if they were sufficient.
 - Assessment of the impact of the updated forms on client experience.
 - Incorporate accomplishments, intelligent failures, and lessons learned into the final report.

PROJECT TIMELINE

Objective	Deadline
RFP released	January 8, 2025
Responses due no later than 5pm MST	January 24, 2025
Successful vendor announced by	February 20, 2025
Contract signed by	March 1, 2025
Draft evaluation report submitted by	July 30, 2027
Final evaluation report submitted by	August 30, 2027

BUDGET & CONTRACTS

MLSA is open to contracting with a single vendor for all deliverables, or contracting with separate vendors for the Legal Server integration (Deliverable 1) and Montana courts system integration (Deliverable 2). The available budget for this work is \$15,000 - \$20,000.

PAYMENT

Payment arrangements will be negotiated with the selected evaluation consultant and may include monthly invoices with 30-day net terms, or 3-4 installments based on agreed upon milestones. With any payment arrangement, the final invoice or payment will be made upon satisfactory completion of the final evaluation report.

THE INFORMATION WE NEED

For consideration, please provide:

1. Vendor's Name, address, federal tax identification number or Social Security Number (SSN), Uniform Business Identifier (UBI) number, and a description of the vendor's legal status, e.g., corporation, sole proprietor, etc.
2. Vendor contact's Name, telephone number, fax number and email.
3. A statement that guarantees that the response constitutes a firm offer valid for sixty (60) days following receipt and that MLSA may accept any time within the 60 day period.
4. A statement on whether the vendor or any employee of the vendor is related by blood or marriage to an MLSA employee or resides with an MLSA employee. If there are such relationships, list the names and relationships of said parties. Include the position and responsibilities within the vendor's organization of such vendor employees.
5. State whether the vendor has been a party in any litigation during the past five (5) years, all such incidents except employment related cases must be described, including the other

parties' name, address, and telephone number. Present the vendor's position on the matter.

6. Provide an estimated number of hours you believe the project will take.
7. Provide a statement of your hourly rate and any other information about your compensation requirements.
8. Proposals that exceed 10 pages in length will not be accepted. Late proposals will not be accepted and will be automatically disqualified from further consideration. Vendors must respond to each question/requirement listed above. In preparing their response, vendors should restate each requirement and then give their response.

SELECTION CRITERIA

We will consider all responses that are sent to lhoward@mtlsa.org by 5:00 pm MST on **January 24, 2024**. Please include the name of the project, "**Evaluator for MT Forms Overhaul TIG**" in the subject line.

The following will be key factors in our decision-making process:

- Demonstrated commitment to customer service and on-time delivery.
- Experience working with legal aid organizations or other nonprofits.
- Successful completion of similar projects and the qualifications and resources necessary to undertake this project.
- Past performance working with MLSA (if applicable).
- Price commensurate with the value offered.
- Responses are presented in a clear, organized, and logical manner.

Attachment 1

TIG24 Montana Online Forms Overhaul Project Project Description

MLSA will prioritize the update, redesign and automation of 20 self-represented litigant forms currently available on MontanaLawHelp.org, using LHI form usage data and the Google Analytics data attached to this application to select the forms most used by self-represented litigants. The revised forms will be significantly different from the forms MLSA automated years ago, taking into account updated technology and simplified maintenance and revisions. The overhaul will incorporate current best practices for plain language, content presentation, ADA accessibility, and ease of navigation.

MLSA will conduct in-depth research on which API document automation will most efficiently and cost-effectively integrate with LegalServer and the Montana Court systems, while enhancing long-term stability. MLSA will look to which platforms are well poised to leverage AI to help self-represented litigants fill out forms. MLSA has already researched Gavel and DocAssemble. MLSA had project planning meetings with Illinois Legal Aid Online and the Suffolk Lit Lab team about their form automation and court integration projects. This head start will allow a quicker project planning phase and ultimately implementation. We are currently inclined towards Gavel because it already integrates with LegalServer and has a more user-friendly interface. However, the open source API document automation offered by DocAssemble through Suffolk Lit Lab has a built-in legal aid collaborative approach with free trainings and community support, including sharing of commonly used code. Suffolk Lit Lab has also worked with integration into LegalServer at Greater Boston Legal Aid, and has experience integrating into the Tyler court system. Montana uses FullCourt case management system and has a contract for e-filing with C-Track by Thomson Reuters. The Court Administrator is considering changing the e-filing vendor within the next year, based on financial considerations, in which case MLSA will be well-poised with this TIG to ensure that e-filing for self-represented litigants is integrated from the start. If the vendor remains C-Track, then MLSA will work with the Court Administrator to certify self-represented litigant e-filing.

Once the document automation platform is selected, MLSA staff will begin to rebuild the prioritized forms from the ground up, starting with a simple Word document. An MLSA staff attorney and a contract attorney will review the legal content of the forms to ensure legal accuracy. From there, MLSA will design the forms in an easily editable format such as Adobe InDesign. MLSA expects several design iterations, including A/B user testing. MLSA staff will then automate the redesigned forms in the selected platform.

Automation will focus on both an external, self-represented litigant facing format and an internal, staff and volunteer facing format, replacing our A2J pro se forms and HotDocs staff forms. MLSA will contract out for integration of these forms into the Montana Court systems and LegalServer. Depending on the existing API code, the integration into LegalServer may ultimately be accomplished by MLSA staff. Prior to their release, the rebuilt automated forms will be tested for usability and the results of the testing will inform project implementation.

MLSA and an evaluation contractor will measure the effectiveness of the automation and integration by using LSC's evaluation tools, user surveys and interviews, collaborative data visualization tools, content tracking tools, and internet tracking tools. Data will be gathered before and after to ascertain and increase project quality. MLSA will incorporate appropriate technology and lessons learned from the recent Consumer Financial Stability Tools TIG project, Automated Indian Will Forms TIG project, and earlier automated forms TIG projects.

The Montana Online Forms Overhaul Project will directly speak to self-represented litigant need for accessible, timely, and convenient legal forms with an integrated ability to e-file with the Montana Courts. At the same time, updated automated forms integrated into LegalServer will free up time and enhance staff attorney and pro bono volunteer advice and brief services.

Attachment 2

TIG24 Montana Online Forms Overhaul Project: Highest Priority Self-Represented Litigant Form Packets

The following is a list of our highest priority form packets. The scope of work will include additional packets, to be determined by MLSA staff. Form packets will be both complex and simple, covering family law (including dissolution parenting plans), housing law, orders of protection, and POAs. The scope of work will be up to 20 form packets total.

1. Dissolution of Marriage*
2. Temporary Order of Protection
3. Answer to Eviction Complaint
4. Motion for Interim Parenting Plan
5. Motion to Modify Parenting Plan*
6. Answer to a Debt Collection Complaint
7. Statement of Inability to Pay Court Costs and Fees
8. Letter to Landlord: Return of Security Deposit
9. Petition to Enforce Parenting Plan
10. Guardianship of a Minor

*These packets will not need updates, they will only need final legal review.