

Request For Proposal (RFP)

Intake & Referral Modernization Project

Goal

To enhance access to justice for low-income individuals in North Mississippi by developing and implementing a secure, mobile-responsive online intake system integrated with North Mississippi Rural Legal Services ("NMRLS") Kamps Prime infrastructure. The project will implement a modern, robust, deterministic logic tree intake portal and mobile-first design, automated eligibility screening, secure document upload and lay the groundwork for future AI integration and multilingual capacity. This project will also include implementing and improving call center operations (Nextiva).

About North Mississippi Rural Legal Services

NMRLS is a nonprofit organization providing free civil legal services to low-income residents of North Mississippi. We aim to enhance access to justice by leveraging technology to streamline our intake process, making it more efficient and accessible to clients.

Project Description

This project will accomplish the creation of a unified, accessible, and efficient intake process. As a priority, clients will be able to submit applications 24/7, schedule appointments, receive automated follow ups and case status, and upload required documents securely from any device. The system will eventually feature voice-to-text and text-to-voice tools to reduce accessibility barriers and tools to help guide users through the intake process.

The new system will improve service delivery by reducing administrative burdens on intake staff, lowering call wait times, increasing completed applications, and providing better data for evaluation and strategic planning. It directly addresses identified inefficiencies, expands service capacity, and supports long-term sustainability through open-source infrastructure and scalable design. This project modernizes how legal services are delivered, making them more accessible, efficient, and client-centered. This project is a follow-up to an Intake Business Process Analysis Report and Recommendation process that NMRLS underwent in 2023. **The 2023 Report will be made available to shortlisted vendors upon request or during the Q&A window.**

Desired Deliverables

- **Objective 1: Online Intake**

Develop and deploy a mobile-responsive, secure, and accessible online intake portal.

- **Objective 2: Intake Triage**

Design and build logic-tree based triage functionality into online intake to screen out ineligible clients.

- **Objective 3: Automated Calendaring**

Implement an integrated scheduling and calendaring system that enables ease of scheduling, modifying, and canceling appointments for applicants.

- **Objective 4: Improved Call Center Operations**

Improve Call Center operations by updating the call center phone tree and workflows, improving call center prompts and guidance for intake workers, and training all intake staff on new operations.

- **Objective 5: Grant Reporting and Evaluation**

The selected vendor will be responsible for providing clean data exports and participating in up to three evaluation syncs, engage in project planning by establishing a project workplan, supporting the selected external evaluation partner, and submitting timely information to support our grant reporting.

Project Prioritization & Phasing Framework

To ensure maximum impact within the \$55,000 maximum available budget, NMRLS has categorized the project requirements into priority tiers. Proposers must provide separate line-item pricing for each tier in their budget proposal so that NMRLS can scale the final scope of work appropriately.

1. Tier 1: Core Requirements

These features represent the minimum viable product (MVP) and must be fully realized within the base cost of the proposal.

- Secure Online Intake Portal: Full development of a mobile-responsive, secure portal.
- CMS Integration: Seamless data transfer via API into the NMRLS Case Management System (e.g., Kemps).
- Deterministic Logic-Tree Triage: Core conditional branching functionality to accurately screen out ineligible applicants based on income and geography.
- Secure Document Upload: A secure method for applicants to upload required verification documents from any device.
- Grant Reporting Support: Basic workplan development and clean data exports to support the external evaluation partner and grant reporting milestones.
-  Center Optimization: Updating core phone trees, workflows, and prompts, alongside providing training and documentation for intake staff.

2. Tier 2: Enhanced Functionality

NMRLS intends to fund these features out of the primary budget, subject to vendor cost-effectiveness and final scoping.

- Automated Calendaring: Integration of user-facing scheduling tools enabling applicants to easily book, modify, or cancel their own intake appointments.
- Multilingual Framework: Launching the portal with core English/Spanish capability, built on an architecture that easily permits future language additions.

3. Tier 3: Future Scalability & Stretch Goals

These components will be evaluated as separate line items and may be deferred to a future phase or distinct funding source if they exceed the core budget constraint.

- Voice Accessibility Tools: Integration of advanced native voice-to-text and text-to-voice accessibility features.
- Generative AI Capabilities: Implementation of predictive or generative AI features beyond standard deterministic logic trees.

Budget Guidance

Proposers should submit a detailed budget in the manner you best see fit, although responses must include, at a minimum, cost breakdown for each objective above. Please note that the maximum available budget does not exceed **\$55,000**.

Estimated Project Timeline

Milestone	Date
RFP Released	July 24, 2026
Questions Due	July 27, 2026
Questions Back	July 31, 2026
Proposals Due	August 21, 2026
Interviews and Selection	Week of August 24th through 28th, 2026
Project Start Date	Approximately September 14, 2026
Project Completion	February 28, 2028

How to Apply

Please send RFP responses and inquiries to **Al Cutturini (apc@nmrls.com)**, with the subject line "*RFP Intake & Referral Modernization Project*" by **August 21, 2026**.

Response Requirements

Prospective vendors must include the following in their submission:

- Firm capabilities and relevant experience with APIs for legal aid Case Management Systems (Kemps and others) and legal aid intake/referral modernization.
- Examples of prior work (e.g., Guided Navigation builds, electronic referral/intake forms, training materials, automated calendaring systems, etc.)
- Project outline, workplan, and timeline tied to the desired deliverables.
- Line-item budget and pricing assumptions; identify any variable costs (e.g., travel).
- Key personnel with roles and qualifications; include CVs or bios.
- Client list highlighting similar engagements and three references.
- Any additional information pertinent to consultant selection.

Evaluation Criteria

Submissions will be evaluated based on the following criteria:

- Technical approach and understanding of North Mississippi Rural Legal Services (NMRLS).
- Demonstrated experience with legal aid CMS APIs (Kemps and others), online intake/referral integrations, and justice partner workflows.
- Quality of prior work products and references.
- Project management plan, staffing, and timeline feasibility.
- Cost-effectiveness and alignment with the project prioritization and budget guidance.
- Commitment to accessibility, data security, and compliance.
- Strength of training, documentation, and change management plan.