Discover Recovery Grant - RFP

Lone Star Legal Aid seeks to contract with a design team to do the following: 1. Design and create a centralized Pro Bono platform/portal for disaster survivors and volunteers for statewide implementation and deployment. The platform should have the capability to 1) serve as a case referral system with automatic routing tools among collaborating agencies, 2) serve as a management tool equipped to manage volunteers across multiple platforms, and 3) aggregate disaster-related pro bono tools, opportunities, trainings, and track case and clinic information. 2. Design and develop non-linear Guided Data Exchange and Referral tools as a more robust solution that will allow legal aid providers in Texas to streamline data collection and enhance the Harvey-disaster survivor user experience by incorporating Natural Language Processing Tools, Communication Integrations and Application Programming Interfaces (APIs);

I. RFP Timeline

- All responses to this RFP must be received no later than 5:00 p.m. (CST) on February 21, 2019.
- LSLA will notify all respondents if we need a formal proposal.
- Respondents must be prepared to start immediately upon selection due to the time constraints of the project.
- Project completion including testing, roll out, evaluation, issue management, final adjustments, and final reporting must occur no later than **August 20, 2020**.

II LSLA Overview & Project Need

Lone Star Legal Aid's mission is to protect and advance the civil legal rights of the millions of Texans living in poverty by providing free advocacy, legal representation, and community education that ensures equal access to justice. LSLA is the fourth largest free legal aid provider in the United States. We serve approximately 60,000 square miles, one-third of the state, including 72 counties in the eastern and Gulf Coast regions of Texas, and also four counties in southwest Arkansas. Based on the most recent Census data for our service area, there are almost 2 million people at 125% of federal poverty guidelines who are eligible for our services. Many of LSLA's clients face isolation due to limited literacy, living in rural and remote locations, and language barriers. In August of 2017 Hurricane Harvey hit the central Texas coast. There were an estimated 13 million victims in the 60 declared Harvey-affected counties. LSLA's client community had already endured 15 declared disasters in the previous 24 months. While the LSLA service area bore the major impact of Hurricane Harvey, the devastation was not confined to the LSLA service area. Texas Rio Grande Legal Aid (TRLA) was also inundated with hurricane-related applications from Harvey survivors in its service area. Droves of displaced coastal residents then took up temporary residence in northern Texas cities serviced by Legal Aid of NorthWest Texas (LANWT). All three of these programs invested great effort in trying to refer and route disaster survivors to the appropriate legal aid offices. Various hotlines went live to route and re-route applicants to available legal aid providers and resources. Intake workers manually forwarded applicants to the providers that could meet their legal needs after collecting information on legal issues, legal venue, and location information. Additionally, pro bono coordinators from the various affected counties worked to secure and direct pro bono volunteers from within their service areas to the areas and clients of greatest need.

While implementing a successful disaster legal aid service plan for Harvey, the three major legal aid providers (LSLA, TRLA, and LANWT), identified a number of challenges that can be addressed and ultimately resolved through a statewide coordinated and collaborative approach to routing disaster survivors to appropriate resource(s) and maximizing the utility and reach of pro bono volunteers in furtherance of disaster recovery and resilience. In order to maintain existing non-disaster casework, accept new non-disaster clients, and meet the increased legal need for disaster recovery within our client community, we are soliciting bids for a company that can create a cloud-based platform that serves a dual purpose. The platform must serve as a central place from which Harvey disaster survivors can seek resources, legal assistance, and information that propels them towards resilience and holistic legal services. In addition, the platform must also serve as a central portal where volunteers in Texas and beyond can come to and from which Texas legal service providers can recruit, manage, and sustain disaster-dedicated pro bono support.

III. Component Expectations

A. Pro Bono Portal Component Expectations The Pro Bono Portal must be able to integrate case and clinic information via API from both LegalServer, the case management software utilized or soon to be utilized by LSLA, TRLA and LANWT, and other organizations that may be utilizing other methods of case and clinic management. (See API Requirements in Subsection III(C), API Development Component Expectations) The Pro Bono portal must also provide pro bono volunteers with the ability to perform the following functions: (a) create a volunteer profile; (b) access training in a variety of mediums (videos, documents, and podcasts); (c) provide feedback on training materials; (d) view and sign up for shifts at disaster clinics and events; (e) notify service providers that they are accepting a disaster case or signing up for a clinic shift; (f) aggregate opportunities from LegalServer via API; (g) sort opportunities based on search function, filter selections, and profile strengths; (h) capture data and generate reports on information required by both users and funders, included but not limited to: number of cases accepted, trainings completed, and volunteer hours; (i) implement a series of motivational accomplishment levels based on the items listed in subsection h; (j) integrate access to external resources such as ‘Expert Chatbot Tools’, and (k) provide document assembly functionality. This portal, as briefly explained above, must include online volunteer registration and an opportunity-matching aspect responsive to each volunteer’s profile selections. On the service provider side, this project must enable providers to have real-time access to volunteer profile information in order to enhance and support volunteer utilization and experiences through individual contacts.

Volunteer profile creation should include at a minimum the following functionality:

- Volunteers can create a temporary account (until approved by an administrator);
- Create the ability for an administrator of the platform to approve the volunteer account and provide access;
- Create the ability for a volunteer to select a legal aid organization for which they wish to register as a volunteer;
- Create the ability for an administrator of a legal aid provider to approve a volunteer’s registration for that provider; and
- Create the ability for a volunteer to indicate certain information to create a match-response, such as general contact information, organizational affiliation (law firm); bar membership information; counties of practice; areas of practice/specialty; populations of interest (e.g. veterans or children); core competency/skills; and languages spoken.

B. Guided Data Exchange & Referral Component Expectations

The Guided Data Exchange (GDE) will be used to implement Interactive Guides to help disaster survivors navigate legal issues focused on disaster situations. The GDE will create logic-based specific workflows or “Knowledge Loops.” The GDE Logic should set up a process to walk endusers through a guided interview to assist them with a given situation. The GDE Logic Platform must be configured to ask specific questions and provide resources to be displayed to the enduser. Based on the answer to a given question (and based on any data previously collected), the logic engine will determine: 1) relevant resources; and 2) next questions in the GDE. The selected vendor will work with LSLA to identify and train a number of specific intents within the Intent Library sufficient to complete an online intake system and a minimum of 3 and a maximum of 10 guided interviews related to the provision of disaster legal services, anticipated to be at least 10 and no more than 20 Intents. The selected vendor will also work with LSLA to determine how to integrate such services into a telephone hotline such that GDE could be used as part of a hotline for legal services.

Specifically, the Guided Data Exchange tool will be able to:

- Communicate and have the required functionality needed to work with LegalServer.
- Gather information using an online intake based on specific processes and workflows.
- Use Natural Language Tools, including building a Natural Language Understanding Library framework so that GDE interface is conversational.
- Differentiate between web-based interfaces and conversational interfaces through created mechanisms.

- Incorporate Machine Learning Tools to Collect Unstructured Data
- Control the behavior of each field in GDE when it is being used in a conversational interface. For example, any field that uses a lookup needs to be connected to a specific Intent within the Natural Language Library.
- Use a framework that processes Natural Language responses through GDE to a specific Intent, returns a (structured) data value and stores the data within the case record within LegalServer.
- Evaluate multiple data points when deciding what the proper information to display is and what is the next question to ask (non-linear).
- Present the end-user with a specific knowledge resource based on given responses through the Interactive Guide or have mechanisms to communicate back to the end-user that GDE failed to understand the response and asks for another response.
- Send a data package via an API to various case management software platforms used throughout Texas.
- Connect with end-users through extended communication channels, including an online intake site, SMS text messaging, and Facebook Messenger.
- Integrate to leverage voice related services, which are offered by various commercial platforms such as Twilio, AWS or Google. Such services will include: text to voice and voice to text.

The selected Vendor will build a state-wide, centralized tool to collect referral criteria for organizations in Texas. Specifically, the Statewide Centralized Referrals for Texas component will be able to:

Implement a state-wide centralized referral framework such that the Guided Data Exchange Tools can access real-time information about legal service providers (services offered and eligibility criteria), and an applicant referral/routing system between providers.

The referral tool must be able to push information to and from LegalServer via API about the 1) legal services offered throughout the state (e.g., where they are located, how they can be reached, what services are offered, eligibility) and 2) applicant information to/from legal service providers (online intake). See API Requirements in Subsection III(C) API Development Component Expectations

A mechanism must also be created to pull information to the referral tool from providers that do not use LegalServer so that the directory can include the services they offer as well.

The referral platform must integrate a way to auto-generate a document based on Guided Data Exchange questions (for example, available resources or whether a referring application has been accepted or rejected).

The applicant referral system will leverage the information in the GDE intake/interview process and push/pull that information for referral between providers using LegalServer as the CMS. A limited amount of applicant information will be initially sent to the referring provider so that a “conflict check” can be done. If no conflict exists and the referral is accepted, the remaining GDE online intake information is sent to the referring provider. If the application is rejected, the system will choose the next appropriate provider for referral. Referrals will continue until no more appropriate referrals are available. If a provider does not respond within an established time period, the system will choose the next appropriate provider for referral.

In the event that FEMA information is not available via API or is not updated fast enough, the selected vendor will build a tool to make FEMA related data available more broadly.

The Work May Include but is not Limited to:

- Working with LSLA and perhaps FEMA to maximize the effectiveness of existing FEMA Resources/Tools;
- Building a centralized tool to store information about Disaster Recovery Centers and Red Cross Disaster Relief Services, including allowing for legal service providers to update/maintain information about each DRC;
- Integrating this tool within LegalServer via API;
- Integrating this tool within the Guided Data Exchange experience; o Making this centralized resource available by a publically available API; o Creating a registration system such that other sites could get API keys to use it; and o Building a geolocation service to store information about each DRC such that this tool can provide a link to the location of the DRC, which can be opened on a smartphone within an App like Google Maps, Apple Maps or Waze.

C. API Development Component Expectations

As discussed above, LSLA, LANWT, and TRLA are all utilizing or will soon be utilizing LegalServer as their exclusive case management software. The selected vendor must be willing to collaborate with LegalServer in the creation of APIs that can communicate between the LegalServer case management system and the product(s) contemplated in this RFP (Pro Bono Portal and Referral system and Guided Data Exchange). The various components of this project must also be able to communicate with one another, as well as with software that is used by other major stakeholders and end-users. As such, the vendor is expected to work with LegalServer to build an API between the LegalServer case management system (CMS) and the platform that hosts both the Guided Data Exchange tools and the Pro Bono portal. In addition, the vendor is expected to configure, train, and test the tools, Intents and Entities used between the platforms. The goal will be to develop APIs that can be used with any Guided Data Exchange or pro bono opportunity aggregating platform. The API will streamline operations by allowing for automated data exchange between the contemplated projects and LegalServer. Expected API creation work is detailed below. Work contemplated in the development of the API(s) includes:

1. Identify Data Items to Exchange: The selected vendor will work with LegalServer to identify and interpret the list of data items the two systems will exchange and agree on standards for those data items. For example, indexes will be used where available, including without limitation legal problem code and language, and the final data design will capture the information required and be compatible with future growth and other LegalServer instances.
2. Validate Basic API Authentication and Communication: The selected vendor will coordinate with LegalServer to test sending and receiving a single data item via API to verify methods and authorization protocols.

3. Determine Data Send and Receive Triggers: The selected vendor will coordinate with LegalServer on the points in a user experience at which data should be transferred between the two systems.
4. Build API Data Packages and Scripting: The selected vendor will work with LegalServer for the construction of the API including methods to securely send/receive data to and from LegalServer and the product(s) contemplated in this RFP.
5. Create System Fields: The selected vendor will create fields that match the agreedupon non-system data items required for this project and that work within LegalServer.
6. Build API Endpoints: The selected vendor will create any required API endpoints.
7. Incorporate data security and/or encryption protocols to insure the security of data, which will include confidential client information.

Other Required API Development Expectations

The project contemplates the APIs listed below. Common between all of the listed components are the expectations that there will be the following:

1. Build a framework to communicate with other software applications;
2. Build an API registration and authentication method;
3. Build API endpoints;
4. Build APIs with the ability to support multiple versions;
5. Build API documentation sites; and
6. Build API endpoints for Intents and with Intent Libraries.

Centralized Referral API

Build API output for centralized referral (organization information, service information, location information, access methods (hotline, online intake, walk-in, etc.), date and time availability, partial and exact match capability).

Guided Data Exchange API

1. Add functionality to processes text by using a specific Intent and return a (structured) data value;
2. Build a queue of requests (text) sent to the API such that the data can be used to further train the system;
3. Build API endpoint for GDE Interviews;
4. Build the ability to generate a new case record within GDE upon receiving information from the external software application;
5. Build API Output for fields, including allowed values (e.g., Yes/No, Date or Lookup value), instructions, headings, limited blocks, calling external third-party APIs and storing responses
6. Store incoming data to a GDE case record; and
7. Develop API for Guided Data Exchange to be used by external apps.

Pro Bono Portal API

1. Build API for creating and updating volunteer information (The purpose of this tool is to keep information in sync with changes entered in an external pro bono volunteer tracking software that might exist);
2. Build an API endpoint to which a third-party software application can connect;
3. Build a method for external software to provide a globally unique ID to the Pro Bono Portal, which can be linked to a given pro bono volunteer or organization record;
4. Build a method for the Pro Bono Portal to return its globally unique ID for the pro bono record; and
5. Build functionality to log activity related to each software application updating records within the Pro Bono Portal.

The Pro Bono Portal will aggregate information about a specific pro bono volunteer such that information about that volunteer can be viewed in one place. It is likely, however, that other organizations will want to build a tool to display that information (for instance within a law firm's Intranet). As such, the selected vendor will build an API to the Pro Bono Portal that will allow a software application to connect to it and query it to get information about a specific pro bono volunteer.

A. The General Pro Bono API Component Must:

1. Build API Endpoint for the Pro Bono Portal specific to pro bono volunteers; and 2. Build API Output for pro bono contact information, organizational affiliation, case assignments, clinics and clinic events, time records, training (outreach), CLE credits, and obligations.

B. The Law Firm API Component Must

1. Build API endpoint for the Pro Bono Portal specific to pro bono volunteers through law firms; and 2. Build API Output for law firm members, information about affiliated members (pro bono users), including their cases, time, assigned clinics and clinic events, training (outreach), CLE credits, pro bono obligations.

*Additional APIs may be contemplated to integrate with platforms such as court CMS systems, other legal resource platforms: and/or integration with specific mapping applications similar to Google Maps.

D. Performance Requirements

All final components of the project must be operationally available online 24/7 with the exception of reasonable planned and scheduled downtime for system maintenance. We require a 99% uptime with a maximum of 10 hours downtime per year. Ongoing usability studies and resulting adjustments are expected to be performed in conjunction with this project and to be completed by

August 20, 2020, along with all LSC approved project milestones.

E. Training Expectations

The selected vendor is expected to train program staff on the use of all tools developed under this project and should account for training time in any proposals or bids submitted.

F. Branding Expectations

A strong brand clearly identifying the services offered and their connection to our client community is paramount. All visual and written components of this project are expected to be uniformly branded and easily identifiable.

G. Platform Design & Hosting Expectations

The selected vendor is expected to identify and select hosting for all centralized website components including the design, development, and execution of the components. The hosting selection(s) and design development should be included in the proposed scope of work. The selected vendor is expected to identify and select a design usability expert(s) for all user-facing components of the project if the vendor does not employ a usability expert. The selected vendor will design, develop and execute a plan for redundant capabilities and data back up sufficient to mitigate in the event of a disaster or failure of mission-critical IT infrastructure, and which will allow 24/7 access to the platform and all data contained within the platform, ensuring 99% uptime with a maximum of 10 hours downtime per year. In addition, emergency access to all platforms and data will be included in the design, development and execution of the plan.

IV. Submission Requirements

All responses must be 10 pages or less (not including references and samples of comparable work), concise and well?organized, and demonstrate how your proposed services, approach and methodology, qualifications, experience, and terms meet or exceed LSLA's requirements. All proposals must also contain the following:

Applicant Information:

1. Applicant's full name, address, telephone number, email, and website;
2. Your submission point?person. Please include title, phone number, and email address;
3. Company overview, including a brief history, mission, number of employees, and number of years in operation;
4. If an independent consultant, your full name, address, telephone number, email, and years working as an independent consultant;
5. Client mix: tell us what percentage of nonprofit, government and commercial clients you serve; and

6. Two (2) recent references concerning your experience with the work described in this RFP. Indicate the reference's name, a brief description of the services provided, and the name, title, telephone number and email address of a reference who is
7. knowledgeable about your work and who may be contacted by our evaluators.

Pricing and Pricing Methodology:

1. Pricing should be a Firm Fixed Price (FFP) and must be itemized by work delivery package or other measurable commodity and include a written explanation of all fees and costs.
2. Vendor shall propose a payment schedule that remunerates the vendor as work is completed and approved by LSLA and the Legal Services Corporation (LSC).
3. Rates must include all overhead and travel costs.
4. LSLA is a 501(c)(3) tax exempt organization.
5. Please provide a description of how you would handle pricing, as a general matter, for any future application enhancements beyond the project period.

Experienced and References

1. A description of your website design and development consulting experience developing complex, interactive applications for legal clients and pro bono volunteers.
2. A description of your experience incorporating GIS data into a website or web-based application with API management and system integration, as this project involves working closely with the legal aid providers' cloud-based case management system (LegalServer).
3. A description of your experience developing legal aid triage systems with components similar to those discussed in LSC's Technology Summit Report -- https://www.lsc.gov/sites/default/files/LSC_Tech%20Summit%20Report_2013.pdf
4. A description of and reference to your experience developing non-linear Guided Data Exchange and SMS technology for other organizations.
5. An overview of your product web development and project management methodologies.
6. Some examples of interactive websites and web-based products that you have developed.
7. If you are utilizing an employee usability expert(s) within your company rather than contracting for that service, please provide evidence of their expertise as it relates to our unique client population.

Project Information

Outline your approach to providing development services in the environment identified in this RFP.

Other Information

Applicant is encouraged to provide other information or material, within the 10 page limit, that it believes is relevant to LSLA's evaluation or that provides additional features or value to LSLA. Some examples of additional value may be:

1. Experience with and ability to provide support with LSC grant reporting requirements;
2. Abilities or accomplishments in user experience assessment, testing, and design; and
3. Experience with and ability to work with multiple organizations and stakeholders in a collaborative project, ability to integrate branding within a tech project design.

V. Preferred Method of Contact

Currently we prefer to communicate via email. As the proposal process progresses we will make ourselves available for phone calls and possible in-person meetings. Please submit questions relating to this RFP by email to Debra Wray at dwray@lonestarlegal.org. All questions and answers will be shared with all participating vendors via LSLA's web site.

VI. Availability During RFP Response Process

The individual(s) involve in this project can typically be reached between 8:00 a.m. and 5:00 p.m. Central Standard Time. Please allow 24 to 48 hours for response time.

- January 24, 2019 RFP Opens
- January 24-February 21, 2019 Available for Questions
- February21, 2019 Deadline for Respondents to submit responses

VII. Cost of Responses Not Included in Budget

Neither Lone Star Legal Aid nor LSC will pay any contractor costs associated with preparing responses or proposals submitted in response to this RFP.

VIII. Evaluation

The contract will be awarded to the vendor who provides the best value – the most advantageous balance of price, quality, and performance – to LSLA. Proposals will be evaluated based on the following criteria:

Price

- The reasonableness of the price for the service being provided.
- Whether the price is realistic (especially if it is an estimate), reflects a clear understanding of LSLA's need, and is consistent with other parts of the proposal

Quality

- Qualifications and experience of company
- Technical expertise
- Project approach
- Level of response detail

Performance

- Capacity
- Understanding of and ability to meet LSLA's needs
- Responsiveness to LSLA

Professionalism

Reputation for excellence in price, performance, and quality

Willingness to accept LSLA and LSC terms (E.g., Texas venue and governing law, no limitation on liability, no binding arbitration, indemnification, and estimated cost, but not to exceed clause.)

IX. LSLA RIGHTS

LSLA reserves the right to:

- Accept or reject any or all responses, or any part thereof;
- Waive any informalities or technicalities contained in any response received;
- Conduct discussions with respondents and accept revisions of proposals after the closing date;
- Make an award based upon various selection criteria;
- Request clarification from any respondents on any or all aspects of its proposals;
- Cancel or re?issue this RFP at any time;
- Retain all proposals submitted in response to this RFP; and/or
- Invite some, all, or none of the respondents for interviews, demonstrations, presentations and further discussion

X. CONFIDENTIALITY

During the vendor selection and project execution phases, you may be given access to LSLA's confidential or proprietary information. You agree not to use this information for your or any thirdparty's benefit and will not disclose this information to any person who does not have a need to know.

XI. FREEDOM OF INFORMATION ACT

The Freedom of Information Act (FOIA) and associated federal regulations may require LSLA to disclose certain documents to the public, including portions of your proposal. Generally, LSLA will not release any documents that would cause competitive harm to a vendor or potential vendor. You are encouraged, however, to label any confidential information contained in your proposal to facilitate LSLA’s ability to withhold it from disclosure.
