

Legal Services National Technology Assistance Project

Developer for Automated

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Developer for Automated Montana Pro Se Forms - RFP

We will consider all responses that are sent to the RFP Coordinator, Alex Clark, at aclark@mtlsa.org by 5:00 pm MST on **March 15, 2019**. Please include the name of the project, "Developer for Automated Montana Pro Se Forms" in the subject line. All vendor communications concerning this Request for Proposal must be directed to aclark@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

Through this Request for Proposal (RFP), Montana Legal Services Association (MLSA) is soliciting responses from vendors interested in developing Automated Montana Pro Se Forms ("Forms.") Using HotDocs and A2J document automation software, the vendor will automate 13 pro se forms for use in Montana State Courts. The Forms are listed on Exhibit A to this RFP.

WHO WE ARE

MLSA is a law firm that empowers low-income people by providing legal information, advice, and other services free of charge. Our mission is to protect and enhance the civil legal rights of, and promote systemic change for, Montanans living in poverty. MLSA accomplishes its mission by engaging with the low income community in Montana to become their advocates to change the systems that keep people in poverty.

PROJECT DESCRIPTION

The objective of the project is to automate Forms using HotDocs and A2J automation software for use by pro se users, legal aid staff, pro bono attorneys, and paralegals in Montana. Forms developed in HotDocs will be geared toward legal aid staff, pro bono attorneys, and paralegals. Forms developed in A2J will be geared towards pro se end users. After delivery of the beta

version of the Forms, the vendor will engage in revision and refinement of the Forms based on feedback from internal and end user testing to ensure that the Forms are working as intended. For a limited period to be determined by the vendor and MLSA, the vendor will also assist in debugging/refining the forms as needed after public launch.

PROJECT SCHEDULE

- RFP released February 22, 2019
- Responses due no later than 5pm MST March 15, 2019
- Successful vendor announced by March 29, 2019
- Contract signed and work commences by April 15, 2019
- Internal testing of the forms begins by August 2, 2019
- End user testing of the forms begins by November 1, 2019
- Complete development of beta version forms by December 6, 2019
- Revisions to automated forms are completed by April 1, 2020
- Automated forms are finalized by May 1, 2020
- Revisions based on evaluation are completed by June 5, 2020

PAYMENT

It is anticipated that payment will be made in three installments contingent upon completion of the development of the Forms. The first payment will be made on or before August 2, 2019, upon satisfactory completion of the initial draft of the Forms. The second payment will be made upon the satisfactory completion of the revisions to the Forms, on or before April 1, 2020. The final payment will be made on June 5, 2020, after completion of all revisions. The payment amounts will be determined by MLSA and the successful vendor. Alternative payment arrangements may be negotiated with a successful vendor.

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 two (2) references for other automated documents or similar projects you have completed. Please include a phone number or email address of the referenced individual so he/she may be contacted.

7. Provide an estimated number of hours you believe the project will take.

8. Provide a statement of your hourly rate and any other information about your compensation requirements.

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 aclark@mtlsa.org by 5:00 pm MST on March 15, 2019. Please include the name of the project, "Developer for Automated Montana Pro Se Forms" in the subject line. The following will be key factors in our decision-making process:

- Demonstrated commitment to exceptional customer service and responding to client requests in a timely fashion
- Experience working with legal aid organizations on automated document projects
- Past performance working with MLSA (if applicable)
- Price that is commensurate with the value offered by the firm/individual and ability to work within a budget
- Responses are presented in a clear, organized, and logical manner
- Candidate has successfully completed similar projects and has the qualifications necessary to undertake this project
- Can demonstrate detailed-oriented nature

Exhibit A – Automated Wills Forms

The following is a list of the 13 Forms to be automated using HotDocs and A2J automation software. The forms are available for review upon request.

1. Fee Waiver, 4 pages
 2. Registration of Foreign Order,
3 pages
 3. Motion for Parenting Plan Modification – Contested, 41 pages
 4. Motion for Parenting Plan Modification – Uncontested, 28 pages
 5. Motion for Interim Parenting Plan, 2 pages
 6. Petition for Contempt (Failure to Follow Parenting Plan), 21 pages
 7. Adult Name Change Packet, 9 pages
 8. Child Name Change Packet, 12 pages
 9. Name Changed (Sealed) Packet, 10 pages
 10. Guardianship of a Minor Packet, 28 pages
 11. Answer to Eviction Packet, 10 pages
 12. Security Deposit Demand Letter, 3 pages
 13. Repairs Demand Letter, 2 pages
- The RFP Coordinator, Alex Clark, can provide copies of the static forms for inspection by developers interested in submitting a proposal for this project.

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<http://www.lsntap.org/node/213/developer-automated-montana-pro-se-forms-rfp>

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