**Community Legal Aid**

**REQUEST FOR PROPOSALS (RFP)**

**Redesign of the Massachusetts Legal Resource Finder:**

**Massachusetts’ civil legal aid triage portal**

Community Legal Aid seeks to contract with a programmer to create a new stand-alone website for the Massachusetts Legal Resource Finder,  [www.masslrf.org](http://www.masslrf.org/), the civil legal aid triage portal for Massachusetts.

1. **PURPOSE AND DESCRIPTION:**

1.1. **Background and** **Purpose:**

The Massachusetts Legal Resource Finder (LRF), www.masslrf.org, launched in 2014 as a result of funding from the Legal Services Corporation (LSC). It was one of the first legal services user-based online triage tools in the country. The LRF continues to see high usage, with 2,500-3,000 searches for legal help per month. It is the most comprehensive online directory of civil legal services for low income people in Massachusetts, with over 80 civil legal aid, pro bono, non profit, government and court based programs or projects included in the database. With nearly 600 legal issues catalogued in the database, the LRF offers users a one stop resource to locate relevant and available legal resources in their community.

With funding from LSC, Community Legal Aid (CLA), in partnership with the Massachusetts Law Reform Institute (MLRI), is undertaking an upgrade of the LRF to improve the user experience for the public who are seeking legal help and for social service providers who are assisting those with legal needs, as well as for the administrators at the legal services programs who are responsible for maintaining the individual program listings. We are also developing a new endpoint to be added to the LRF results - a “guide me tool” to help people identify whether the housing problem they are experiencing may have a component that can be addressed with legal remedies.

The current LRF is part of [www.masslegalservices.org](http://www.masslegalservices.org/), which uses the Drupal content management system. As part of the upgrade, we are moving the LRF to its own Drupal 8 website.

In the current site, those seeking legal help enter their location, income, age and then select their issue from a list of almost 600 specific issue areas, which are organized by topic and uses branching logic. The upgraded site will keep this branching logic, but will add an additional field to allow users to describe their issue using natural language.

The upgraded site will include additional demographic factors such as whether the person seeking help is a victim of crime, a veteran, or has a disability.

At the back end, there is a record for each legal help provider which includes very granular information about which of the almost 600 legal issues they can assist with, and the specific geographic, financial and age requirements to get service for each issue.

1.2. **Goal:**

The overall goal of this project is to improve the LRF by adding enhancements that will make it easier for users to identify their legal problem and locate appropriate and available legal help, and for administrators to maintain and update their resource listings. This will be achieved through a number project objectives including:

* Adding an Artificial Intelligence powered interface to the LRF so that users can start their search using natural language
* Redesign the search results display and related views so that users can more easily locate and navigate the variety of legal resources available to them
* Improve the user interface for participating program administrators who maintain LRF listings so they can more easily interact with the site to update their listing
* Improve the display of all programs in the LRF so that community partners can more easily learn about legal programs in their service areas.
* Add an administrative interface with analytics and reporting.
* Adding a “guide me” tool to the LRF that will enable users to more comprehensively identify certain housing issues which have legal implications

1.3. **Scope of Work and Deliverables**:

CLA is initiating this RFP to solicit responses from developers interested in creating a standalone website for the LRF. This new site will be based on Drupal 8. The front end can use Drupal, or can use an API to connect to front end interfaces based on other frameworks, such as AngularJS.

In conjunction with a designer, CLA has already developed the visual designs and work flows for the new website, including the necessary user interfaces, results pages and the form that admins will use to keep their listings up to date. The successful developer from this current RFP will be implementing these designs. Selected designs are available for review upon request.

The natural language search is being powered by a separate legal classifier tool - the developer will not need to build this tool. However, the developer will need to integrate the legal classifier with the LRF through an API.

Similarly, the “guide me” tool is being developed separately, but will need to display as an endpoint on the LRF.

The developer will also need to import content from the existing LRF (built in Drupal 7 and currently part of www.masslegalservices.org), remove the LRF from the existing MassLegalServices site, and perform any necessary patches to ensure that MLS functions properly without the LRF section of the site.

CLA will engage in user testing of the site after the beta version is released and expects the developer to make modifications to the system based on feedback and user testing results. The vendor will also assist in debugging/refining the website as needed after the public launch.

Prior to final release, developer will document a description of the technical components and functionalities /capacities of the website.

Additional detailed project specifications and functions can be found in Appendix B.

1.4 **Budget**: The funding for this project derives from an LSC TIG, and the budget allocated for this portion of the project is not to exceed $40,000

1.5 **Timeline for Completion:** As per the RFP schedule, the successful vendor should be available to begin work as soon as feasible after the contract is signed. We desire to have certain deliverables completed as follows:

Beta site launch -- December 15, 2019

Public launch, adjustments to MassLegalServices.org -- April 15, 2020

Post launch debugging, final documentation -- July 30, 2020

All work to be completed by December 31, 2020

1.6 **Payment:** Payment will be made in installments as agreed-upon milestones are met. Proposals should be “total cost” bids covering all specifications. All proposals must be fixed bid with a not-to-exceed amount.

2. **RFP ADMINISTRATION AND INSTRUCTIONS TO VENDORS**:

2.1. **RFP Coordinator**: Upon release of this RFP, all vendor communications concerning this acquisition must be directed to the RFP Coordinator listed below. Any oral communications will be considered unofficial and non­binding on CLA. Only written statements issued by the RFP Coordinator may be relied upon.

Gordon Shaw, Director of Client Access

Community Legal Aid

20 Hampton Ave, Suite 100

Northampton, MA 01060

E­mail: gshaw@cla-ma.org

Telephone: 413-727-7104

2.2. **RFP Schedule:**

RFP released – July 15, 2019

Responses due not later than 11:59 pm ET on August 5, 2019

Successful vendor announced – August 12, 2019

Contract signed and work commences – August 23, 2019

2.3.  **Vendor Questions:** Vendors may contact the RFP Coordinator at the address and/or numbers listed in Subsection 2.1 above with any questions concerning this RFP. All questions must be received prior to the response due date and time listed in Subsection 2.2 above. Written questions are preferred and should be submitted by e­mail to ensure receipt and timely response.

2.4. **Response Format:** The proposal must be sent electronically via e­mail in Microsoft Word 97 or newer version, RTF, or Adobe PDF format to the RFP Coordinator designated in Section 2.1 of this RFP. The e­mail subject should be clearly marked “Massachusetts LRF Proposal ”.

Vendors should allow enough electronic delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Vendors assume the risk for any e­mail delay problems.

2.5. **Response Requirements and Content:** Vendors must respond to each question/requirement contained in Exhibit A, Vendor Response. In preparing their response, vendors should restate each requirement and then give their response.

2.6. **Costs of Preparing Responses:** CLA will not pay any vendor costs associated with preparing responses, submitted in response to this RFP.

2.7. **Responses Property of CLA:** All responses, accompanying documentation and other materials submitted in response to this RFP shall become the property of CLA and will not be returned.

2.8. **RFP Amendments/Cancellation/Reissue/Reopen:** CLA reserves the right to change the RFP Schedule or issue amendments to this RFP at any time. CLA also reserves the right to cancel or reissue the RFP. All such actions will be posted on CLA's website.

2.9. **Minor Administrative Irregularities:** CLA reserves the right to waive minor administrative irregularities contained in any response.

2.10. **Inability to Enter Contract:** CLA reserves the right to eliminate from further consideration any vendor that CLA, because of legal or other considerations, is unable to contract with at the time responses are due in accordance with the schedule contained in Subsection 2.2 above.

2.11. **No Obligation to Enter a Contract**:

2.11.1. The release of this RFP does not compel CLA to enter any contract.

2.11.2. CLA reserves the right to refrain from contracting with any vendor that has responded to this RFP whether or not the vendor's response has been evaluated and whether or not the vendor has been determined to be qualified. Exercise of this reserved right does not affect CLA's right to contract with any other vendor.

2.11.3. CLA reserves the right to request an interview with any vendor and/or a demonstration from any vendor prior to entering a contract with that vendor. If a vendor declines the request for an interview or demonstration for any reason, the vendor may be eliminated from further consideration.

 2.12. **Multiple Contracts:** CLA reserves the right to enter contracts with more than one vendor as a result of this RFP.

2.15. **Non­-Endorsement:** The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to CLA in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of CLA.

2.16. **Contract Payment Limitations:** Vendors should anticipate payment at the end rather than the beginning of the invoice period in which they provide services or after they submit any deliverable for which a payment is due.

**3. RFP EVALUATION:**

3.1. CLA and MLRI’s Evaluation Team (Team) of at least two (2) persons will evaluate the responses to this RFP. The Team may also consider past contract performance and check references beyond those listed in the vendor’s response.

3.2. As part of the evaluation process, at the discretion of the Team, vendors may be asked to clarify specific points in their response and may seek to interview the vendor by telephone. However, under no circumstances will the vendor be allowed to make changes to the response.

4. **POST EVALUATION**

4.1. **Notification of Selection of Apparently Successful Vendor:** Vendors whose responses have not been selected for further negotiations or award will be notified via e­mail.

4.2. **Contract Award/General Terms and Conditions:** Vendors selected to provide application services will be expected to enter into a contract with CLA.

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**EXHIBIT A - ­VENDOR RESPONSE**

Responses must contain the following information in the following format. Please restate the requirement or question and number your responses to correspond with the information requested here.

1. Vendor’s Name, address, federal tax identification number or Social Security Number (SSN), 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 CLA may accept any time within the 60­day period.

4. A statement on whether the vendor or any employee of the vendor is related by blood or marriage to a CLA employee or member of its Board of Directors or resides with an CLA employee or member of its Board of Directors. 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 at least two (2) references for same or similar services you have completed for other programs in the last five years. Please include a phone number or e­mail address of the referenced individual so he/she may be contacted.

7. Provide 3 work samples of similar projects or links to a design portfolio

8. Please provide a Statement of Interest and Understanding which includes a description of your approach to completing the Scope of Work and Deliverables along with a detailed project timeline and detailed project budget.

9. Please state your total cost for completing this work.

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**EXHIBIT B - ­DETAILED PROJECT SPECIFICATIONS AND FUNCTIONS**

1. The website must be device responsive, so that it performs equally well on PC, tablet and smartphone devices. The majority of our public users will access the site from a mobile device, so it is essential that the site have a mobile friendly design.

2. The website must perform equally well on all major internet browser types, including Chrome, Safari, Edge, Firefox and Internet Explorer.

3. The site must implement UI/UX best practices including but not limited to use of WCAG 2.1 guidelines. We require the website to be 508 compliant.

4. Use branching triage logic developed by CLA to guide users to endpoints depending upon their needs and available legal resources. The system will collect information from users through a series of questions and answers and primary endpoints will be links to a wide variety of legal service providers. Endpoints will also include links to the “guide me” and to internal LRF nodes with links to legal information. The triage system will cover approximately 12 to 14 legal topics.

5. An alternative entry point to the branching logic will be a field where users can describe their problem in their own words. This description will be parsed by a legal classifier tool to determine whether the user’s issue matches with one of the terms in the triage logic with a high degree of certainty. If so, these options will be returned to the user. The vendor will need to connect the LRF with the legal classifier tool through an API. We must be able to map the terms returned by the classifier to the triage terms in the LRF. A plus would be if in addition to linking this natural language search to the legal classifier, the LRF could also suggest triage term matches to the user based on internal site search, in a way that is seamless to the user.

6. The system will also ask users for a series of mandatory and optional demographic information, including location, income, age, and other factors. All of these factors, as well as the legal term that the user selects, will be incorporated into the site search.

7. The admin form must allow administrators to enter very granular information about when the legal services program should be returned as an option for the user, including differing results based on factors such as income, age, legal issue, disability, veteran status, etcetera.

8. The system should allow users to print, email and text (if using a mobile device) results.

9. The site should be based on Drupal 8. However, the vendor can propose alternative front end interfaces, such as those based on the Angular JS framework, if this will result in a more nimble, streamlined experience for users. Ideally, the system will build upon Drupal based triage systems already in place in Connecticut, Maine, Michigan, Ohio, Minnesota and Illinois, importing many of the functionality from these sites but modifying as needed to meet our needs. See, e.g., <https://ctlawhelp.org/en/legal-help>, <https://michiganlegalhelp.org/guide-to-legal-help?icn=triage_onramp&ici=homepage_image>, <https://www.lawhelpmn.org/lawhelpmn-guide>, <https://www.ptla.org/find-legal-help>, <https://www.illinoislegalaid.org/get-legal-help> In general, the site should be developed using free, open source software that avoids proprietary licensing and undesirable licensing restrictions.

10. The system should anonymously save user session data. Multiple users must be able to access a fresh triage page when the site is accessed in public spaces.

11. The system should enable thorough analytics and in-depth reporting on usage of the triage system. The site admin must be able to easily run reports that display how many users are starting and completing searches and at what point users are dropping off. The reports should also display which legal issues are being searched, demographic characteristics of users, the types of referrals being generated and a comparative display of which issues various legal services programs have selected to provide assistance with.

12. The system must be multilingual - currently the tool is in English, Spanish and Portuguese. Updating criteria in one language must automatically update related fields in the other languages.

13. The system should include triggers and reminders for LRF admins about what types of selections they have made for their records, and letting them know by email when listings should be reviewed and/or updated.