Zope/Plone Website Maintenance

Request for Proposal

LawHelp Interactive (www.lawhelpinteractive.org)

Pro Bono Net, Inc

Introduction

Pro Bono Net (PBN), a national nonprofit headquartered in New York City is requesting proposals from qualified vendors with experience in the implementation of Zope/Plone Content Management Systems (CMS), to partner in the maintenance of LawHelp Interactive (www.lawhelpinteractive.org) an award-winning online legal document assembly service.

Background

LawHelp Interactive

Originally developed in 2003, with support from the Federal Legal Services Corporation, LawHelp Interactive (LHI) provides a technical infrastructure as well as training and technical support to nonprofit legal aid organizations and courts using document automation to serve the needs of low income individuals and other self-represented litigants.

LHI empowers self-helpers, pro bono attorneys and legal services advocates to create legal documents using easy-to-understand interviews, and supports broader efficiencies through the integration of these services with statewide website, case management, intake and e-filing systems. In 2012, LHI is supporting document assembly initiatives in at least thirty five states, and will assemble over 400,000 legal documents. It is anticipated that LHI usage will increase by up to 40% in 2013.

Pro Bono Net

Pro Bono Net is a national nonprofit organization dedicated to increasing access to justice through innovative uses of technology and increased volunteer lawyer participation. Pro Bono Net uses innovative web-based platforms – www.probono.net, www.lawhelp.org, and www.lawhelpinteractive.org – to recruit and support volunteer lawyers and provide direct information and tools for self-representation to low-income communities.   Pro Bono Net has also developed Pro Bono Manager, pro bono practice management software that helps AmLaw 200 law firms increase pro bono participation, manage pro bono caseloads more efficiently, and raise internal and external awareness of pro bono efforts. For more information, please visit www.probono.net.

LawHelp Interactive Technology

The request in this proposal is to support the main LHI Plone interface functionality and to work with vendors as needed to maintain integrations with other systems.

LHI Plone Interface/ Zope Database

The Plone, the hub for all LHI activity can be accessed at www.lawhelpinteractive.org or via links posted on partner websites. Plone is a free open source content management system. All LHI users access this interface configured to accommodate functionality on a user type basis. Template providers can upload and manage templates designed to work in LHI. The following "Interview Takers" will also primarily interface with LHI: Advocates may log in and be able to support the Pro Se interview submission; Proses can find templates and store and manage their answer files on LHI.

In the standard cases, inputs into the LHI system consist of data directly entered by the user via the web-based interview, from previously entered answer files retrieved by the user and applied to a new interview, or from answers stored in court or case management systems which have been set up to integrate with LHI.

The output of LHI is an assembled document, combining elements of the document template and the answer file. This file is in a .rtf, .pdf, or .doc format, at the discretion of the template developer. In a few limited cases an LHI interview will not be associated with a document template. Instead partners who support these templates will periodically download XML answer file data from LHI for additional processing.

A Zope database supports the Plone interface and houses all uploaded templates and their related Meta data.

A2J Author & HotDocs

LHI interfaces with our software partners A2J Author, a user friendly, Flash-based interviewing tool, and HotDocs, a more robust interviewing tool. The Plone interface, designed to launch the uploaded template files in their native application viewers supports the interview takers answer submission process while their access to LHI specific functionality is maintained.

Other 3rd party Web Services

Plone has been configured to integrate with several other 3rd party components. These components enable LHI to implement various LHI functionalities without building them from scratch. The system has to maintain the integration with the existing 3rd party components throughout the lifecycle of the development and maintenance work.

Custom Intersystem Integrations

Over the last year or so LHI developed integrations with external interfaces including court E-filing Systems and legal aid Case Management Systems. Data transmissions between all systems and databases are performed through web service calls.

Reporting Databases

There are several reporting SQL databases within the LHI infrastructure. Plone integrates with them updating them so that accurate reporting can be done SQL statement calls or via a MSSQL interface to provide Pro Bono Net staff the ability to run ad hoc reports regarding usage of templates, integrative technologies and user groups.

Splunk

Splunk, LawHelp Interactive's tool used for issue resolution, has been configured to index Plone logs for trouble shooting Plone integration issues. Searching in Splunk will inform on whether Plone is responding as it programmed.

LawHelp Interactive Features

User Groups

LawHelp Interactive supports functionality based on user type. The two categories of user types are Template Developers, users that upload interviews on LHI's website and Interview Takers, users that launch the embedded interview via partner websites for document generation. Account types that would participate in interview fall into the following categories: Self-Helper, Advocate, Court Employee or Event Coordinator.

Functionality

Primary features for Template Developers are related to acting as a repository of HotDocs templates for LHI partners. The following list describes features in this category:

1) Supporting A2J Author or HotDocs template uploading via the template upload utility pages. Upon template upload LawHelp Interactive generates a URL for embedding allowing users to interface with partner websites. These unique URLs to uploaded templates allow partners to provide access to interviews within partner websites. During this process, template developers can set settings regarding how the interview being uploaded should display as well as how it should be classified to function. For example the following features can be set: Language, Audience etc. They will be able to view the details regarding the interview at any time.
2) Providing an interface for managing uploaded templates and supporting the template's use within LHI such as template release status and template sharing status.

Users wishing to participate in interviews and assemble documents can browse a list of partner websites where links to embedded LHI interviews live. Once opening a link, LawHelp Interactive allows users to:

1) Complete templates for document assembly
2) Download assembled documents
3) Revise answers immediately after completing an interview
4) Login, create or manage an account
5) Save answers from interviews if they are logged into the system
6) Retrieve answer files from earlier sessions and apply them to other interviews.
7) Email or share answer files from their LHI use account
8) Share their answer files with other organizations/agencies
9) Send their answers from LHI to court e-filing vendors/systems

Software Requirements

Interview Takers: Minimum expectations are that a user is accessing the site on a PC running Internet Explorer 6.x or later for HotDocs interviews, or a PC or Mac running Internet Explorer 6+ or Firefox 2+ with the latest version of Flash installed.

Template developers: Additional software requirements are A2J Author 4.0 and or HotDocs 10.1

RFP Requirements

Scope

The scope of this work is limited to the Plone/Zope code base within the LawHelp Interactive (LHI) application at Pro Bono Net's direction. The work will primarily be in the context of code maintenance and bug fixes to the existing LHI functionality. Work will be assigned to meet 80 hours per month.

Capacity to undertake additional work on LHI is outside of this core RFP upon request.

Responsibilities

- Develop and maintain the code for the LHI system in an optimal technical way
- Ongoing support of LHI production system code base
- General expectations in support the development efforts are as follows:
    a. Providing estimates for work to be included in monthly launches
    b. Coding enhancements/bug fixes to be included in monthly launches
    c. Maintaining bug fixes and enhance in coordination with Pro Bono Net & other vendors
    d. Proper source code documentation
    e. Release support
    f. Supporting technical stakeholder initiatives
    g. Other tasks as directed by Pro Bono Net.

Work Experience

Must have the following experience:

- 3-5 years of Python, JavaScript, XML & CSS development
- 2-4 years in the role of technical lead
- Problem existing solving issues in current software
- Managing user groups and permissions in Plone
- Writing web service calls
- Addition languages: XSLT
- Producing technical documentation

Nice to have experience:

- Experience as a Plone website architect
- Configuring Splunk
- SEO Optimization

Timeline/Milestones

- Timeline: January 1, 2013 – December 31, 2013, subject to review on a quarterly basis.

Effort

- Time and materials cost with not to exceed 80 hours per month.

Response Handling

Proposals are due by no later than 5:00 p.m. EST on Friday, December 14, 2012. Proposals will be evaluated immediately thereafter. We may require you to be available for interview by phone or web meeting during the week of December 17. Final vendor selection will be made by December 21. We will notify all parties of whether or not they have been awarded the contract by Friday, December 21. Negotiations will begin immediately with the successful candidate and should conclude no later than December 31, 2012.

Please send proposals to the attention of James Wiegand, Technology Director, jwiegand@probono.net.

In your response we expect the following:

- Samples of Relevant work
- 2 - 3 References
- Estimated Cost/hr

Evaluation Criteria

The criteria that we will use to evaluate your proposal will be:

- Suitability of the Proposal
- Experience
- Value/Pricing structure and price level
- Depth and breadth of staff
- Demonstrated commitment to high service level agreements (SLA)

Contact

We welcome any follow up questions related to this request for proposal or regarding further relevant LHI details. Any questions or meetings to be scheduled will be coordinated by Ahuva Shabtai. Contact her via email: ashabtai@probono.net or via phone Tel: 646-504-7362.