probono.net

CitizenshipWorks Platform Redesign

Table of Contents

1 Applicable Documents in this RFP

The following documents are included in this RFP.

Appendix A – New project sitemap

Appendix B – Functional specifications on key screens

Appendix C – Wireframes set 1 – Home & Dashboards

Appendix D – Wireframes set 2 – Organization Login

Appendix E – Wireframes set 3 – Virtual Review

Appendix F – Visual Identity Brand Book

Appendix G – Key pages design (mockups)

2 Executive Summary

2.1 Who is Pro Bono Net?

Pro Bono Net is a national nonprofit organization dedicated to increasing access to justice through innovative uses of technology, strategic collaboration, and increased volunteer lawyer participation. Pro Bono Net's innovative web-based platforms (e.g., www.probono.net, www.lawhelp.org, and www.lawhelpinteractive.org) are used by public interest law firms, pro bono programs and courts across the country to recruit and support volunteer lawyers and provide direct information and tools for self-representation to low-income individuals. Pro Bono Net developed the Citizenshipworks platform with two organizations – the Immigration Advocates Network and the Immigrant Legal Resource Center – and is partnering with them on the redesign of CitizeznshipWorks, under that auspices of the New Americans Campaign (www.newamericanscampaign.org). The selected applicant will work closely with all three organizations on the implementation of the new platform. Pro Bono Net will serve as the lead technical manager for the engagement, with responsibility for all technical decisions related to the platform and integration with third-party platforms, as required. The Immigration Advocates Network will serve as the lead product manager, with responsibility for overall project management, product development, and content design and development. The Immigrant Legal Resource Center will serve as substantive expert, with responsibility for legal review of system content and workflows. Pro Bono Net, a 501(c)3 nonprofit organization with headquarters in New York City, is the contracting organization for this RFP.

2.2   What is CitizenshipWorks?

CitizenshipWorks is a collaborative web-based software ecosystem that provides interactive tools and resources to help guide lawful permanent residents (green card holders) in the United States through the naturalization process (the process of becoming a U.S. citizen). The CitizenshipWorks website (www.citizenshipworks.org) is an online platform designed to scale the effectiveness of naturalization legal-service providers, and to provide easy-to-use online tools to help low and moderate-income individuals to answer important questions about their eligibility for naturalization, to better understand the naturalization process, and to prepare for the naturalization tests. In addition to serving individuals directly, the site is also designed to enable nonprofit immigration providers to more effectively scale service delivery to applicants they are assisting in both in person and virtual models of service delivery.

3   General Considerations

This RFP is not an offer to purchase services. Acceptance of a proposal neither commits Pro Bono Net (PBN) to award a purchase contract to any service provider, even if all requirements stated in this RFP are met, nor does it limit PBN right to negotiate in its best interest. PBN reserves the right to contract with a service provider for reasons other than lowest price.

3.1   Confidentiality/Non-Disclosure

The information contained in this RFP or accumulated through other written or verbal communication is confidential to PBN. The information is provided for proposal preparation purposes only and is not to be used for any other purpose. The terms and conditions of the nondisclosure agreement signed by the parties specifically govern disclosures made pursuant to this RFP.

3.2   Right of Rejection

PBN reserves the right to accept or reject any or all responses to this RFP and to enter into discussions and/or negotiations with one or more qualified suppliers at the same time if such action is in the best interest of PBN.

3.3   Best Offer

PBN requests that responses to this RFP be the vendors' best presentation of your company. It is in your organization's best interest to demonstrate how your organization's offer represents the desired capabilities that can add the greatest overall value to PBN.

General criteria for acceptance includes but is not limited to:
-    PBN's perception of the supplier's ability to execute on its proposal;

- Completeness of the response;
- Strategic alignment to PBN's mission and technology plans;
- PBN's assessment of the long-term viability of the supplier; and
- Ability to enter into a mutually satisfactory agreement with the supplier.

3.4 Cost of Proposal

Expenses incurred in the preparation of proposals and presentations (if applicable) in response to this RFP are the supplier's sole responsibility with no reimbursement from PBN unless otherwise specified. PBN reserves the right to utilize any concept or ideas contained therein, without incurring any liability.

3.5 Conditions and Disclaimers

PBN has issued this RFP to solicit responses and possible bids from potential service providers for a comprehensive solution to the requirements as outlined in this document. Only the execution of a written contract, reviewed and approved by PBN's legal counsel and signed by an officer of PBN, will obligate PBN in accordance with the terms and conditions contained in such contract.

- PBN reserves the right to amend or cancel this RFP in any manner prior to contract award.
- PBN will notify any responsive bidders in this event.
- PBN reserves the right to share, with any consultant of our choosing, the RFP responses and any proposals in order to secure expert opinion.
- Bidders are hereby advised that PBN is not committed to any course of action as a result of its issuance of this RFP and/or its receipt of a proposal from you or other companies in response to it. In particular, it should be noted that PBN may without limitation:
  - Reject any proposal which does not conform to instructions and specifications issued herein.
  - Not accept proposals after the stated submission deadline.
  - Not accept the lowest priced proposal.
  - Reject all proposals, if it so decides.
  - Negotiate with one or more companies separately.
  - Award a contract in connection with this RFP at any time.
  - Award a contract not in connection with this RFP at any time.
  - Award only a portion of the contract.
  - Make no award of a contract.

4 Licensing

The Service Provider shall process proper licensing in accordance with all Federal, State, County and/or municipality laws, rules, and ordinances governing the security industry of the state service is being performed in and ensure that all responders, second tier providers, or subservice provider have the same on file with the service provider and made available to PBN immediately on their request.

5 Response Instructions & Format

Please refer to section 8.5 "Response instructions" for the mandatory sections to include with your response.

Please direct all correspondence to Matthew Burnett at mburnett@probono.net and Doug Carlson at dcarlson@probono.net. Please submit any questions regarding the RFP on or before Friday, December 6, 2013; your RFP response must be submitted in an electronic format to the same email addresses on or before Friday, December 13, 2013.

6 Evaluation Process

During the evaluation process, we will conduct a thorough analysis of your company's prices and service capabilities, and their value to PBN. Price is important, but it is not the sole factor in our evaluation process. We will also consider other factors, such as, whether your company can meet our quality and service requirements, and the likelihood that PBN and your company can form a successful partnership. Each Service Provider will be evaluated on identical criteria. PBN may award this RFP, in whole or in part, to one or multiple Suppliers as needed to achieve the best total value to PBN. None of the information provided by PBN should be deemed as a guarantee of business.

7 Terms of Bid

Expenses relating to the preparation of your company's proposal are entirely your responsibility. The terms of your company's bid proposal should be valid for at least 90 days from submission. This RFP is not an offer to enter into an agreement with any Service Provider. This RFP is a request to receive proposals from Service Provider interested in supplying products and services to PBN. We reserve the right to accept or reject any proposal and to enter into negotiations with any party or parties to provide products or services.

8 RFP Structure

This RFP will guide you through the specifications of the new CitizenshipWorks website. The specifications detailed here are essentially functional, the choice of technological answers to each functionality is at the discretion of the responding entity.

This RFP will guide you through the functionalities, described in the form of users' journeys (section 9.4.3), where you will be invited to check out the corresponding wireframes and key functionalities screens available in the Appendix. At the end of the different users' journeys, we give you an overview of the key technological bricks (section 9.4.4) required to execute these journeys as intended.

9 Statement of Work

9.1 Purpose

The purpose of this RFP is to develop and launch a new CitizenshipWorks online platform in two phases:
- A first version to be released in June 2014
- A second version to be released in December 2014

The user experience described in the section 8.4, as well as the new visual identity described in the Appendix, are the result of a 6-month research, design and consultation with the different stakeholders of this service.

The goal of the new website is twofold:
- **Help more people:** increase the number of people accessing the platform and ensure that they will find the right level of assistance required to accurately determine their eligibility for naturalization, and to securely prepare applications for naturalization, either on their own, or with assistance from qualified nonprofit organizations and pro bono attorneys offering virtual or in-person services in conjunction with the online CitizenshipWorks service,
- **Increase organizations' efficiency:** provide nonprofit organizations with tools and resources to enable them to effectively assess and triage the needs of naturalization eligible individuals seeking their assistance, and to effectively and efficiently scale staff and volunteer capacity to provide secure, high quality services to more applicants, regardless of geographic location or income level.
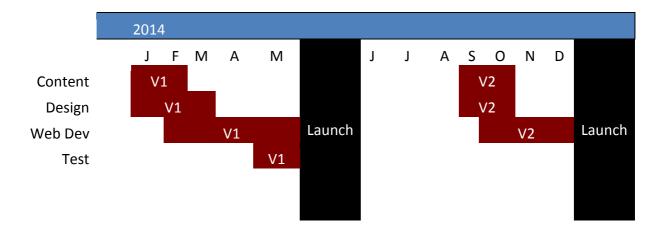
9.2 Proposed timeline

The timeline for the first part of the project should not exceed a 6-month time period starting with the contract award in early January 2013. The following timeline is a suggested timeframe, and

the actual timeline details will be determined between PBN and the successful bidder upon contract award.

9.3 Scope of work

9.3.1 V1 & V2 scopes

Technical specifications and wireframes presented in this RFP constitute our vision for the final product. **The scope is divided into two phases, Version 1 and Version 2, Version 2 is only expected to be quoted and Version 3 should be considered as an opportunity to explore future enhancements.**

This web platform is intended to have 3 different types of users, V1 will be focused on Applicants and Organizations while V2 will be focused on creating an Advocate dashboard.

Although the platform will be available for use by Applicants of all social and economic backgrounds, it should be noted that the target demographic for the service includes significant numbers of low-literacy, limited-English-proficient (LEP) individuals, and the Applicant experience should be designed with the needs of these users in mind. All elements of the platform must be Section 508 compliant, and meet ADA (US) accessibility standards.

Each functionality point listed in the following versions refers to functionalities used in the users' journeys (section 9.4.3) and explained in the functionalities overview (section 9.4.4).

- **Version 1:** expected to be delivered within the proposed timeline and budget

Fully developed and functional:
- o The full content accessible to anonymous (i.e., logged out) users as described in Appendix A, including design implementation;
- o The complete Applicant journey as described in section 8.4.4, including design implementation, including payment system;

- o The complete form management system, allowing applicants to complete the eligibility test and interview and to render the N-400 form in PDF format (including a PDF417 2D barcode on each page); and
- o The complete rules management system able to raise flags and determine the most effective recommended service option depending on the answers to interview questions.

Organizations' dashboards and functionalities
- o No distinction between Advocates and Organizations
- o Functional virtual review and virtual assistance (including video and chat)
- o Organization should be able to view applicants' cases
- o Integration with third party case management system APIs such as "Law Logix"
- o Functional event management (add, update, remove, enlist, check-in)
- o Functional calendar management (Advocates available for virtual assistance)
- o Basic reporting functionality, including Google Analytics integration and native reporting for key metrics (e.g. number of registered users, number of registered users at key stages of the application process, etc.).
- o

⇨ The V1 common dashboard for both Advocates and Organizations will consist in the Key Screen 3 (Appendix B) without: the network sidebar, the resources sidebar, Inbox. "Upcoming events" section will display events as well as upcoming virtual assistances.

Out of scope:
- o Design implementation for the Advocate dashboard
- o Organizations' network management
- o Forum, Tutorials, Advanced support
- o Messaging system between Advocates/Organizations

- **Version 2:** only expected to be quoted in the response to this RFP

Fully developed and functional:
- o Advocates and Organizations dashboards and functionalities as described in section 8.4.4, including design implementation
- o Forum, Tutorials, Advanced support for Advocates and Organizations
- o Messaging system between Advocates/Organizations
- o Organizations' network management

- **Version 3:** only expected to be quoted in the response to this RFP

Explore advanced functionalities:
- o Allow Organizations to import their calendar (Google Calendar, iCal, etc.)
- o Allow Organizations to embed their calendar on their website, allowing applicants to register to CitizenshipWorks through it.
- o Add Organizations' volunteers management
- o Responsive design

9.3.2 Budget

Envelope for this V1 is $350k, including project management, design and development.
V2 and additional functionalities (referred to as v3) should be budgeted based on the cost breakdown of v1.

9.3.3 Project Management

9.3.3.1 Developing the platform

Required tasks:
- Coordinate the project between the CitizenshipWorks team, designers, and developers
- Report regularly (on a weekly basis) to the CitizenshipWorks team about the project's status

9.3.3.2 Building & launching the service

Required tasks:
- Gather content in collaboration with, and with advice from, the CitizenshipWorks team
- Advise the CitizenshipWorks team with a launch strategy
- Assist the CitizenshipWorks team on their users and organizations acquisition and marketing efforts.

9.3.4 Design

Required tasks:
- Replicate and implement the design provided in the Brand book (Appendix F) and the key mockups (Appendix G) for all the pages of the website
- Provide the development team with all the required materials

9.3.5 Development

Required tasks:
- Develop the website following the specifications listed in this RFP
- Report to the project management team about any issue or advice regarding the platform

9.4 Technical specifications

9.4.1 User profiles

We identify four types of users on this service:
- o **Super Administrator:** is in charge of the content available on the website and its maintenance, user administration, and has access to native reporting functionality.
- o **Applicant:** is looking for help and information on becoming a US citizen, his final goal is to print a complete and validated N-400 form, with or without any external help, or be screened out due to ineligibility.

o **Organization:** is a non-profit, formed by volunteers and Advocates (attorneys and other legal workers), who organizes local naturalization events where applicants can receive legal help and may refer applicants to the service for pre-screening and application support (e.g. pre-filling parts of the application) prior to an event.

o **Advocate:** is presented with different cases of applicants who had issues completing their N-400 form or reviews an application at the request of an applicant. He is using the platform online via virtual assistance, or during an in-person interview at an Organization's event.

9.4.2   Constraints

This document being a functional RFP, the main constraint relies in respecting the user experience designed and presented in this RFP, using the technology of your choice. However, for security requirements reasons and due to the specialization of the maintenance team, the preferred main development language for this platform is .NET.

An answer will still be considered without .NET, but a different technological choice must be motivated.

9.4.3   Users' journey

This section describes our vision for the platform. The Applicant Journey is the main focus for the v1 build. Once all versions are completed, all journeys must be fully implemented.

While the overall functionality of each Journey must be delivered, the Vendor may suggest alternatives to the detailed steps to improve usability.

9.4.3.1 Applicant Journey

Please refer to Appendix A "Content available from homepage" and "Applicants' process overview".

- The applicant is directed to www.citizenshipworks.org (online referral or in-person invitation at a workshop)
- On the homepage, she is offered different paths: (Appendix B – Key Screen 1)
    o "Find legal help" will direct her towards a page where she can browse a database of Organizations and see upcoming events
    (see http://www.citizenshipworks.org/legalhelp/)
    o "Prepare for the tests" will direct her towards a page providing her content on the civic and English tests.
    o "About naturalization" and "Applying through CitizenshipWorks" will redirect her to content pages
- By choosing to take the "Eligibility test", the applicant enters the process: (Appendix A – Page 2)
    o The applicant is redirected to a form similar to the N-400 seen in Appendix C – Page 1, which will be tested against a set of rules set by the admins, raising flags.
    o If the applicant is not eligible, she will be redirected to "Find Legal Help", with a screen suggesting a list of legal assistance providers.

- o If no flags are raised, or only flags the platform can help him resolve, she is invited to sign up to the service, with his answers saved into the database for further use.
  - o The applicant can create her account with an email address or a phone number, to which a verification message will be sent.
- Once the account is validated, the Applicant is invited to fill out the N-400 form: (Appendix B – Key Screen 2)
  - o The form is pre-populated with eligibility test answers.
  - o Questions can be skipped except for the pre-populated ones.
  - o At any time, the applicant can print an incomplete version of the N-400 form, in which case it will be printed with a watermark.
  - o Before printing, the applicant is prompted with a donation screen.
  - o Throughout the process, flags are raised following a set of rules set by the admins.
- At the end of the process, if any flags have been raised or questions remain unanswered, the applicant is invited to seek legal help: (Appendix B – Key Screen 6)
  - o The applicant can choose whether to register to a local workshop or book a virtual assistance session with an Advocate.
  - o Once her option is chosen, she is prompted with a recap (Appendix B – Key Screen 7).
- When all issues/flags are cleared, applicants are able to print their filled N-400 without watermark.
  - o Before printing, applicants are prompted with a donation screen
  - o Once the N-400 printed, they are invited to consult the "Prepare for the tests" page

9.4.3.2 Organization Journey

Please refer to Appendix A "Content available from homepage" and "Organizations' pages overview".

- Organization cannot register on their own, in order to be invited (by a super admin) to the platform, they must request an account on the "Get involved" page accessible from the homepage.
- Once invited they go through the registration process (see Appendix D – Organization Login wireframes)
- They can log in via the login button on the homepage (Appendix B – Key Screen 1) where they can access their Organization's dashboard (Appendix B – Key Screen 3)
  - o The main part of the screen is dedicated to events, with a preview of the Organization's next event, and a complete list of its upcoming events. Past events are also accessible via a tab switch with "Upcoming events".
  - o The second navbar on the screen is dedicated to Organization actions
  - o A sidebar on the left is formed by several widgets, offering stats on the functionalities available through them.
- Clicking on the title of an event or on "modify the event" gives access to the "Event Management" page of the event, where the Organization is able to change the date, name, see participants, etc.

- Clicking on "Start the event" allows the Organization to set the event in "live mode" allowing the Organization to start checking in participants. (Appendix B – Key Screen 4)
- Clicking on "Inbox" redirects to an in-platform messaging system between Organizations and Advocates, as well as notifications and reminders from the platform.
- Clicking on "Calendar" redirects to a monthly calendar where each Organization's event is listed and where the Organization can add new events.
- Clicking on "Report" or on the stats widget redirects to a page where the Organization can browse its statistics.
- Clicking on the top-left picture redirects to the account settings page (Appendix D, wireframes 6 to 8)
- Clicking on "Your network" widget redirects to the network page where the Organization can add Advocates to its list of affiliated Advocates, and browse its network.
- Organizations have access to different resources such as a forum (shared between Organizations and Advocates), tutorials (content on how to use the website) and technical support.

9.4.3.3 Advocate Journey

Please refer to Appendix A "Content available from homepage" and "Advocates' pages overview".

- Advocates have no means to register on the platform without an invitation from an existing Organization.
- Once an Advocate has registered an account on the platform, he can log in via the "Log in" button available on the homepage (Appendix B – Key Screen 1) to access its dashboard (Appendix B – Key Screen 5)
- The structure of the dashboard follows the Organization's dashboard, except the focus is not on the events anymore, but on the applicants' cases.
- Clicking on an applicant's name in the list of pending cases or on the agenda redirects to the application review page of this applicant (similar to Appendix B – Key Screen 9) where the Advocate can review quickly the final N-400 form, modify answers, and start the virtual assistance (chat and video) with the applicant.
- Clicking on "Calendar" in the navbar redirects to the Advocate's personal calendar, showing its booked legal assistance and allowing him to plan and modify its availability for legal assistance.
- Clicking on his portrait redirects to its account panel where he can modify his info.
- In the left sidebar the "Organization" widget allows the Advocate to access the list of his Organization's events or his Organization's calendar.
- As available to Organizations, Advocates can consult forums, tutorials, and have access to technical support.

9.4.4 Technology overview – Key functionalities

In order to provide these different users with the best experience, some core functionalities are required. This list is an overview of what we consider necessary to implement on the website:

General functionality

- Account management with four profiles (Applicant, Advocate, Organization, Super Admin)
- SSL security
- Two-step authentication
- Language switch at any time – user may select the language for all text in the site. Initial languages to be implemented are English and Spanish, with the ability to easily add other languages at a later date.
- Official ID verification - allowing people to scan or take a picture of their ID and checking it's validity automatically. (e.g. Jumio API)

Communications functionality
- SMS/Email (and possibly telephonic) notifications
- Internal messaging system
- Video-chat system – embedded tool within the system. May be third party.
- Calendar management
- Private forum – discussion forum with topics and threads
- Online customer support/ticketing system – may be embedded third party component

Interview and document generation functionality
- Advanced form management – define sections, steps, questions, answers, tips, consequences between questions, and manage questionnaire tree.
- Advanced warning management (set up rules issuing warnings depending on form's answers) – embedded rules-based expert system that can advise user based on their form answers
- Document management (upload and storage)
- Document generation (PDF)
- PDF417 2D barcode generation/support
- Payment processing or integration with a third-party payment system

Integrations
- Integration with third party case management system APIs such as "Law Logix" – this is a two-way integration, where user form answers are pulled from an external system and used to populate the form in this system, and where the user, after filling out a form in this system, can have it uploaded to the external case system.

Activity logging and reporting functionality
- Activity logging – The system should log all activity in a format suitable for generating comprehensive usage reports. Activity logged would include events such as: site visits, user registrations, request account, interviews started, completed, forms generated, language changed (e.g. English to Spanish), virtual assistant used, etc.
- Reporting – Development of actual reports is out of scope for V1.

In order to better understand how these core functionalities are used, please refer to Section 9.4.3 and to the appendix.

9.4.5   Art direction

Please refer to Appendix F – Brand book

9.5   Response instructions

A response to the RFP must include (but is not limited to):

1- Company introduction
2- Examples of previous work
3- Architecture of the service, including technological choices
4- Detailed technological choices for each required functionality
5- A quote detailing the cost of each functionality with a subtotal for Version 1, and projected costs for further versions' functionalities
6- One (1) mockup of the applicant dashboard

In the case of a joint proposal, the role of each company in the project must be explained and each company must provide an introduction and examples of previous work.

The deadline for responses to this RFP is Friday, December 13th, 2013. Questions regarding any element of the RFP should be submitted by email to dcarlson@probono.net and mburnett@probono.net by no later than Friday, December 6th.

10 Appendix

NOTE: The wireframes and layouts in these appendices represent the desired interface design, but the Vendor may suggest specific modifications if it will result in improved usability.

Appendix A – New project sitemap

Appendix B – Functional specifications on key screens

Appendix C – Wireframes set 1 – Home & Dashboards

Appendix D – Wireframes set 2 – Organization Login

Appendix E – Wireframes set 3 – Virtual Review

Appendix F – Visual Identity Brand Book

Appendix G – Key pages design (mockups)

Appendix A
New project sitemap

Key:

- Blue patches (K1, K2,…): references to Key Screens available in Appendix B
- Green patches (W1.1,W2.1,…): references to Wireframes in Appendix C,D,E

Appendix B
Functional specs on key screens

Appendix C
Wireframes set 1 – Home & Dashboards

Appendix D
Wireframes set 2 – Organization Login

Appendix E
Wireframes set 3 – Virtual Review

Appendix F
Visual Identity Brand Book

Appendix G
Key pages design (mockups)

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