

# Request for Proposal (RFP)

## For

## Usability Review of LawHelp Interactive Online Document Assembly Platform ([www.LawHelpInteractive.org](http://www.LawHelpInteractive.org))

### 1. Executive Summary

Pro Bono Net seeks a consultant to undertake an independent assessment of the usability of LawHelp Interactive (LHI), an award-winning online legal document assembly service operated by Pro Bono Net under contract with Ohio State Legal Services Association (OSLSA). Pro Bono Net is a nonprofit organization dedicated to increasing access to justice through innovative uses of technology and increased volunteer lawyer participation.

Details of the scope of work for these areas are elaborated in the Statement of Work below.

We are requesting proposals from qualified interested parties of the cost and time estimates for each of the potential areas of investigation, which are to be submitted by June 30, 2016. This project is being funded by a grant awarded by the Legal Services Corporation to OSLSA.

### 2. Statement of Work

#### 2.1 Purpose

This engagement will be to provide a comprehensive review of our LawHelp Interactive (LHI) system to assess the overall usability and effectiveness, from the perspective of several key user types: (i) Self-helpers, who are one-time or occasional users of the system; (ii) Advocates, who are frequent users of the system to provide legal assistance to clients; (iii) Court Employees, who are frequent users, often providing assistance to patrons of court self-help centers; and (iv) Template Providers, who are frequent users of the system, with administrative privileges allowing them to post and manage interactive interviews hosted on LHI.

This review will also include the intersection of LHI with various statewide legal aid and court websites (including the LawHelp.org Network), as they are part of the broader workflow through which most users find and link to LHI to take interviews and generate free legal forms.

We are considering embarking on a comprehensive overhaul of the LHI user interface. Key goals of this redesign effort will be to:

- Optimize the end-to-end service design to provide a seamless and intuitive user experience
- Insure that new users find the system intuitive and easy to use, and that the content is sufficient and appropriate to guide their journey
- Insure that return users are able to easily access, manage, and re-use, saved session data
- Insure that overall functionality and workflow meets the needs of a diverse various user group
- Create an updated design that uses current design best practices
- Create a design that functions well on mobile devices

The usability assessment project outlined in this RFP is intended to provide an in-depth understanding of the strengths and weakness of the current interface, and to provide a clear roadmap of changes as well as specific design guidance as input for the upcoming redesign work.

## 2.2 Scope of Proposal

Specific areas of system usability to be addressed include:

- **Content** – Review the instructional text of the system for content, location and effectiveness in guiding users through use of the system. Suggest any changes to customize content to each of the key user types.
- **Workflow** – Review major workflows through the system, for Self-helper and Advocate users. Note any issues and suggest improvements and ways to streamline processes. A key workflow involves the Finding Forms process, where users search across LHI and one or more partner sites to find the appropriate interview form for their needs.
- **Design** – Review the current screen designs, and make specific recommendations for improvements that can be incorporated into the new redesign.
- **User Stories** – Gather through focus groups or other means, information to document key user profiles that can be used to guide current and future development priorities.

- **Pop-ups** – Review the current system’s use of pop-ups and multiple windows, and make any recommendations for changes to improve usability.
- **Mobile** – Review the site from the perspective of a mobile user, and make any recommendation to improve usability. Focus particularly on suggestions for a new mobile layout to maximize usability for self-helper and Advocate users. These suggestions will serve as input for the redesign, to create an effective mobile responsive layout.
- **Connect** – The LHI system has a recent addition to its functionality called Connect, which supports remote collaboration between Self-Helpers and either Advocates or Court Employees on document creation and review. This functionality has a different usage scenario, and a different entry point into the system. Recommendations are sought on how to harmonize the Connect experience with the core LHI functionality.
- **Integrations** – LHI has undertaken pilot integrations with a number of other online systems, including legal aid case management (CMS) and court customer relationship management (CRM) and e-filing systems (EFM). Recommendations are sought on how to harmonize the user experience of these integrations with the core LHI functionality.

## 2.3 Deliverables

The deliverable for this effort will be an evaluation report, **delivered no later than Friday, September 23, 2016**, that includes:

- Write-up of current challenges in each outlined area of the system
- Actionable suggestions for improvements to improve site usability and effectiveness
- Select mockups or other artifacts as examples sufficient to illustrate various points in the recommendations

## 3. General Considerations

### 3.1. Qualities we seek in a team

The agency(ies) we hire will:

1. Have familiarity with best practices in high volume, secure B2C and B2B online transactions
2. Demonstrate the ability to work collaboratively

3. Familiarity with the legal industry and experience with the design of technology in that domain is a plus
4. Experience working with government or non-profit clients is a plus

### 3.2. Terms and Conditions

All work done for the project and content will be owned by Pro Bono Net, its successors and assigns. Pro Bono Net, its successor and assigns, will have full access to and have the right to customize all outreach materials.

### 3.3. Proposal Format

RFP responses may be delivered electronically via email in Microsoft Word or newer version, RTF, or Adobe PDF format. Proposals should adhere to the format below.

1. Introduction/executive summary, including:
  - Project understanding, recommendations & objectives
2. Project Schedule and Development process, including:
  - Explain your process for creating a final scope of work document - e.g., define deliverables, create milestones, etc.
  - Explain your customer communication and project evaluation procedures
3. Project Budget Estimates and Cost Projections, including:
  - Provide a breakdown of costs
  - Identify any additional expenses, fees, etc. that you will require to complete the project
4. Company or Agency Profile, including:
  - Background, capabilities, and related experience
5. Attachments:
  - Examples of similar projects recently performed
  - Summary of clients in the legal domain and in the non-profit or government realm
  - Short biographies of all who will work on the project
  - Professional references
  - Summary of standards, regulations and best practices that the consultant proposes to use in the course of this assessment, including a brief summary of how the standard applies by LHI and information on the group that publishes the standard.

#### 4. Timeline and Evaluation Process

Proposals should be delivered in electronic format by 5 pm ET on Thursday, June 30, 2016 to:

Doug Carlson, Director of Technology & Operations  
Pro Bono Net  
Email: [dcarlson@probono.net](mailto:dcarlson@probono.net)

Between the release date of the RFP and the submission deadline, we will respond to any questions you may have via email to the contact above.

Our team will review proposals, conduct interviews, and select a final vendor by July 22, 2016, with work to begin shortly thereafter. The selected vendor will be expected to enter into a contract with OSLSA shortly thereafter. Vendors whose responses have not been selected for further negotiations or award will be notified via email.

#### 5. Additional Terms

**5.1. Costs of Preparing Responses.** Pro Bono Net will not pay any vendor costs associated with preparing responses, submitted in response to this RFP.

**5.2. Responses Property of Pro Bono Net.** All responses, accompanying documentation and other materials submitted in response to this RFP shall become the property of OSLSA and will not be returned.

**5.3. Proprietary Information/Public Disclosure.** All responses received shall remain confidential until the evaluation is completed and the vendor is selected and approved. Thereafter, responses shall be deemed public records.

**5.4. RFP Amendments/Cancellation/Reissue/Reopen.** Pro Bono Net reserves the right to change the RFP Schedule or issue amendments to this at any time. Pro Bono Net also reserves the right to cancel or reissue the RFP.

**5.5. Minor Administrative Irregularities.** Pro Bono Net reserves the right to waive minor administrative irregularities contained in any response.

**5.6. Inability to Enter Contract.** Pro Bono Net reserves the right to eliminate from further consideration any vendor that Pro Bono Net, because of legal or

other considerations, is unable to contract with at the time responses are due.

**5.7. No Obligation to Enter a Contract.** The release of this RFP does not compel Pro Bono Net to enter any contract.

- Pro Bono Net 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 OSLSA's right to contract with any other vendor.
- Pro Bono Net 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.

**5.8. Multiple Contracts.** Pro Bono Net reserves the right to enter contracts with more than one vendor as a result of this RFP.

**5.9. 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 Pro Bono Net in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of Pro Bono Net.

**5.10. 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.