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LONE STAR
LEGAL AID

Justice has no boundaries

Request for Proposal:

Custom Software Development:

LACI Document Source Extension

April 2025

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Lone Star Legal Aid (LSLA) seeks proposals from qualified vendors to modify and update a currently existing software project called LACI (Legal Aid Content Intelligence), described below. We use LACI to ensure that our publicly accessible self-help content, generally available at https://www.lonestarlegal.org/resources/self-help/, is kept up-to-date by alerting our document authors (known as "editors" and "reviewers") when relevant web resources are updated. When the web resources change, we want to know as soon as possible so we can update our own information resources and self-help tools.

Should you choose to submit a proposal, you will be "Respondent" below.

RFP AND PROJECT TIMELINE

All responses to this RFP must be received no later than 5:00 p.m. (US/Central) on May 5, 2025.

Respondents must be prepared to start as soon as possible upon selection due to the time constraints of the project.

Project completion, including issue management, evaluation, final adjustments, and final reporting must occur no later than December 31, 2025.

LACI OVERVIEW

Lone Star Legal Aid's mission is to protect and advance the civil legal rights of the millions of Texans living in poverty by providing free advocacy, legal representation, and community education that ensures equal access to justice. LSLA is the fourth largest free legal aid provider in the United States. We serve approximately 60,000 square miles, one-third of the state, including 72 counties in the eastern and Gulf Coast regions of Texas, and four counties in southwest Arkansas. Based on the most recent Census data for our service area, there are almost 2 million people at 125% of federal poverty guidelines who are eligible for our services. Many of LSLA's clients face isolation due to limited literacy, living in rural and remote locations, and language barriers.

As legal professionals, we generate documents that explain the law to various people. These documents are memoranda to other lawyers, both in our firm and outside it. They are letters explaining legal matters to our clients. They are filings in court that explain the law to judges and other parties. And they are legal information that we put up on our website or hand out to the public.

Of course, the law we explain to others is not under our control. Instead, these "Authorities" are laws created by our legislatures, rules adopted by the courts, agency regulations, online forms, and other authoritative explanatory web pages. We need to know when these Authorities change, so we can make sure our explanatory documents are kept up to date.

To keep all of these documents up to date, we have developed LACI, the Legal Aid Content Intelligence software system. This software tracks all our relevant legal documents and allows us to register which external Authorities each document depends on. Texas authorities, as well as US/federal authorities, are all available online, which means that LACI can check them periodically, and alert our reviewers and editors when a document needs to be reviewed. When the documents themselves change, reviewers and editors are notified to review to make sure LACI continues to have the correct Authorities.

This software is currently in use and has been active since May 2024.

LACI has been developed as a set of Drupal modules and a LACI theme. A main module, *laci_core*, handles the core operations of LACI and includes software to access and analyze general web pages and PDF forms, as well as federal Authorities such as the US Code, the Code of Federal Regulations, and Federal Rules of Evidence and Civil Procedure. A second module, *laci_texas*, can access Texas statutes, regulations, and rules. A custom module *laci_lsla* loads in these two, the LACI theme, and sets up some LSLA-specific configuration for our environment.

The code is available under the Affero GNU General Public License version 3 (or later) and can be found in the repository at https://codeberg.org/LACI.

WHAT WE NEED

For this project, LSLA is looking for a software development partner ("Respondent") who is a Drupal module expert, preferably one who is familiar with www.texaslawhelp.org and who has worked with our partner the Texas Legal Services Center (TLSC), and who can help us with at least the following changes to LACI (not necessarily in this order):

1. LACI currently runs as a stand-alone Drupal web application, monitoring and managing legal information documents that are stored in SharePoint and in Google Drive. For this project, we need to either update **laci_core** or create a new **laci_node** module so LACI becomes able to monitor and manage Nodes of specific Content Types in an existing Drupal application (e.g., www.texaslawhelp.org).
2. To accomplish the above, the LACI Drupal modules must be installable into an existing Drupal application. This also means that it must be possible to cleanly uninstall them as well. This project will update the necessary LACI modules (including at least **laci_core** and **laci_texas**) to cleanly uninstall.
3. Currently the **laci_core** module includes the code necessary to implement a REST interface to LACI internal information. However, this is not necessary for all use cases, including this one. This project will "split out" the REST-enabling code into a separate, optional **laci_rest** module.
4. Because the aim of this project is to have a working LACI implementation within the existing Drupal application at www.texaslawhelp.org, it may be necessary to make other changes to **laci_core**. Initial explorations suggest that once #2 and #3 above are completed, there should be minimal if any work to do to accomplish this. This is the overall goal of this project and must be accomplished successfully for this work to be considered complete.

In addition to these updates, Respondent will support LSLA with updates to LACI as necessary to respond to updates in third party components or newly identified issues in the existing software.

EXPECTATIONS

LSLA will contract with a vendor to modify LACI as a work-for-hire as described below. The proposed budget/price only needs to cover the cost of accomplishing the milestones below; LSLA will cover the cost of hosting the testing and production servers, and any other ongoing operating costs.

TECHNICAL SCOPE

Based on experience we expect the development effort to have substantially the following phases. Please estimate the percentage of total effort for each phase in your response and discuss how you would approach implementation in each phase. You may recommend any additional or alternative approaches.

1. **Discovery**.

   During the initial phase of the project, meet with the LSLA and TLSC teams to discuss various initial requirements:
   - Location(s) of development, testing, and production servers.
   - Confirmation of development methodology, use of git and branches, etc.
   - Design wireframes, as appropriate, for any user-interactive elements of the project.
   - Scheduling periodic follow-up meetings.
   - Any other kick-off activities valuable to starting the project.

   This phase should take between two and four calendar weeks.

2. **Develop and deliver: Split out laci_rest from laci_core**.

   Our initial experiments attempting to load LACI into www.texaslawhelp.org suggest that it will be both important and beneficial to remove the REST API support from **laci_core** and move it to a separate optional Drupal module (**laci_rest**). Once that is accomplished, laci_core will no longer depend on modules that seem to be incompatible with www.texaslawhelp.org ("TLH").

   Acceptance criteria: The **laci_core** module no longer installs and exposes REST API endpoints, and no longer depends on "basic_auth", "rest", and "restui". The LSLA standalone LACI server can load the **laci_rest** module and perform the same functions as it did when the REST API was part of **laci_core**. The **lsla_laci** module will depend on **laci_rest**, which depends on **laci_core**.

3. **Develop and deliver: any other changes necessary to load LACI cleanly into TLH**.

   Implement any changes necessary to **laci_core**, **laci_texas**, **laci_theme_switcher**, **laci_add_authority_modal**, and **lacitheme** so they load successfully into TLH and perform as they would in a stand-alone LACI Drupal web application.

   Acceptance criteria: It must be possible to load these modules and theme into TLH without conflicts. Public visitors to TLH must thereafter interact with the site as though LACI had not been installed into it. For authenticated users with appropriate permissions, the LACI

functionality in TLH must operate similarly to a stand-alone LACI instance (e.g., LSLA). The modified modules and theme must operate correctly in LSLA's LACI instance.

4. **Develop and deliver: changes to LACI to monitor Nodes of specific Content Types**.

Currently LACI monitors and references documents stored in SharePoint and in Google Drive. We need to extend LACI to be able to monitor and reference Nodes of specific Content Types within an existing Drupal web application.

Implement a configuration page that allows an administrator to specify which Content Type(s) will be monitored for new Nodes to add to LACI.

- o When a new Content Type is added to the list, all existing Nodes of that Content Type that are not already Documents in LACI must be added as Documents to LACI.
- o When a Content Type is removed from the list, all Documents in LACI that refer to Nodes of that Content Type must be unpublished.

Thereafter, every new Node of each of the configured Content Type(s) will be added as a Document in LACI for monitoring. If a Node of a configured Content Type is unpublished or deleted, the corresponding Document in LACI must be unpublished. These changes will likely be accomplished by implementing an EventSubscriber that will react to onInsert, onUpdate, and onDelete events. Documents in LACI can be unpublished by an administrator to stop them from reporting status changes, and re-published if the administrator wants LACI to begin monitoring them again.

One important consideration: LACI Documents can be exported and imported (see **Drupal\laci_core\Entities\Document**). In the current implementation, a Document refers to its monitored document using a Link field. This won't likely work with Nodes. If the LACI Document Content Type is updated to include a reference to a monitored Node, then the **getShortData**() and **getBackupData**() methods need to provide enough information to restore a LACI Document's reference to a particular Node even if the **uid** or **uuid** of the Node has changed (e.g., the referenced Node itself has been exported and then imported with a new **uid** or **uuid**). See, e.g., how a Document refers to its list of referenced Authorities, how a Review references a Change and a Document, etc.

Acceptance criteria: To be accepted, this work, and the work described in the steps above, must be completed no later than August 31, 2025.

It must be possible to use LACI within TLH to monitor Nodes of specific Content Types. It must be possible for LACI to monitor a specific Node, to be told not to monitor a specific Node, and to send alerts to appropriate LACI Monitors when the contents of a monitored Node changes.

5. **Develop and deliver: clean hook_uninstall() code and procedures for the modules affected in Phase 3 above.**

Core LACI modules create settings, views, taxonomy vocabularies and terms, and content types as part of their installation process. Because these are not removed when the modules are uninstalled, they can't be cleanly installed again. This makes it difficult for LACI to be added to and removed from a Drupal web application, such as TLH, that has functions that work without LACI.

Implement any changes necessary to **laci_core**, **laci_texas**, **laci_theme_switcher**, and **laci_add_authority_modal** so they can be successfully removed from and then reinstalled into TLH. This is likely to require changes to the "config/install" YAML files in these modules, so their settings (and the relevant Drupal objects they create) can be deleted when the module is uninstalled. This will also require the implementation of an appropriate hook_uninstall() function or method (see Drupal\Core\Hook\Attribute\Hook). Modules must not uninstall themselves if that would affect existing Nodes. There are existing LACI Drush commands that can back up, restore, and delete LACI-related Nodes, so a message to that effect can be given to an administrator if they attempt unsuccessfully to uninstall a LACI module.

Acceptance criteria: It must be possible to cleanly install and uninstall the modules listed above, **laci_core**, **laci_texas**, **laci_theme_switcher**, and **laci_add_authority_modal**. Modules that manage content (**laci_core**, **laci_texas**) must not uninstall if there are any Nodes that would be adversely affected by their removal. Uninstallation should, as much as possible, also remove Views, settings, Taxonomy Vocabularies and/or Terms, and even Content Types (if possible) that were created during the installation process.

6. **Finalization: Bug fixes and finalization**.

Effort required to fix any bugs and to bring software into compliance with the project specifications. This phase also includes any final required documentation, and effort required to hand over the code and any access and/or tools necessary to maintain the running environment. We expect this last phase to take at least 10% of the total project time.

Acceptance criteria: acceptance of delivered code and confirmation of functionality by both LSLA and TLSC. LACI must be running successfully inside the production instance of www.texaslawhelp.org.

Communications with LSLA

Communication with LSLA on a regular basis will be important to the project's success.

It is expected that in some phases of the project, particularly during Discovery, it may be helpful for Respondent to schedule a brief daily "stand up" meeting to respond to a faster pace of project development. Generally, LSLA expects to meet with Respondent at least weekly.

During development phases, Respondent will be expected to work with LSLA personnel to evaluate updates in the development server, then submit "git pull requests" for LSLA to incorporate into its testing and eventually production servers.

For any other communications outside regularly scheduled meetings, LSLA and Respondent commit to generally responding to email messages from the other by the next business day, unless circumstances prevent.

SUBMISSION REQUIREMENTS

All responses must be twenty-five (25) pages or fewer (not including references and samples of comparable work), concise and well organized, and demonstrate how your proposed services, approach and methodology, experience, and terms meet or exceed LSLA's requirements. All proposals must also contain the following:

RESPONDENT INFORMATION

1. Respondent's full name, address, telephone number, email, and website.
2. Your submission point person. Please include title, phone number, and email address.
3. Company overview, including a brief history, mission, number of employees, and number of years in operation.
4. Client mix: tell us what percentage of nonprofit, government, and commercial clients you serve.
5. Two (2) recent references concerning your experience with the type of work described in this RFP. Indicate the reference's name, a brief description of the services provided, and the name, title, telephone number and email address of an individual who is knowledgeable about your work and who may be contacted by our evaluators.

SUBCONTRACTORS

If subcontractor(s) are proposed to complete this project, a description of the services provided by the subcontractor(s), their location, and the Respondent's contract management process and selection criteria for subcontractors. State the percentage of work performed by subcontractor(s).

PRICING AND PRICING METHODOLOGY

Please submit a single firm fixed price (FFP) bid for the work outlined above. Payment will be made upon milestone completion, and not on an hourly or time-and-materials basis. The price must not exceed $24,000.

Please estimate a percentage of overall time for each of the phases or proposed milestones in the technical scope. The total should sum to 100%. Please also include an estimate of how long in weeks you anticipate it will take to complete the milestones in the technical scope. Please explain any factors that may affect your estimate.

LSLA is a 501(c)(3) tax exempt organization.

Pricing must include all overhead costs needed to complete the work in the proposal.

EXPERIENCE AND REFERENCES

- Describe your experience working with any non-profit organization for whom you provided a similar service. In particular please describe any work you have done on www.texaslawhelp.org or with Texas Legal Services Center.
- Specify the approximate percentage of business you received in the past year for creating custom software for customers.
- Describe your knowledge and experience creating custom software products, with a focus on experience relevant to the technical requirements, including technical scope and communications.
- Detail your quality assurance plan or process.

- List your personnel who will manage the services provided. This list must identify a point of contact who will manage the development process as well as a point of contact to manage business questions. Small organizations and individuals can name the same person in both roles.
- Describe your proposed project and team organization. Identify key employees and/or supervisors.
- List the certifications and credentials and experience of staff members, contractors, and subcontractors who would perform the work.
- Provide a statement on whether the Respondent or any employee of the Respondent is related by blood or marriage to an LSLA employee or resides with an LSLA employee. If there are such relationships, list the names and relationships of said parties. Include the position and responsibilities within the Respondent's organization of such Respondent employees.
- Describe your testing protocols, including how improvements are incorporated and retested.
- Describe your ability to meet scope requirements Section A – Technical Scope and B – Communication.
- Provide samples or descriptions (links would be great if you can provide them) of your work on other similar projects.

OTHER INFORMATION

Respondent is encouraged to provide other information or material, within the 25-page limit, that it believes is relevant to LSLA's evaluation or that provides additional features or value to LSLA. Some examples of additional value may be experience with and ability to provide documentation for LSC grant reporting requirements and/or abilities or accomplishments in user experience assessment, testing, and design.

Respondents must submit responses and documents in their technical proposal in the order above. Proposals must reference each paragraph/subparagraph number along with Respondent's response as outlined above.

PREFERRED METHOD OF CONTACT

We will communicate with Respondents via email. Please submit questions relating to this RFP by email to Luigi Bai at lbai@lonestarlegal.org. All questions and answers will be shared with all participating Respondents via LSLA's web site.

Please include "**RFP for LACI TIG24 TLSC**" in the subject line of your email when sending questions and final proposals.

AVAILABILITY DURING RFP RESPONSE PERIOD

The individual(s) involved in this project can typically be reached by email between 8:00 a.m. and 5:00 p.m. Central Standard Time. Please allow 24 to 48 hours for response time.

- April 11, 2024: RFP opens.
- Through May 5, 2025: Available for questions. All questions must be submitted in writing. Questions and answers will be posted to a public page along with this RFP.
- May 5, 2025, 5:00 PM US/Central: Deadline for Respondents to submit responses.

COST OF RESPONSES NOT INCLUDED IN THE BUDGET

Neither Lone Star Legal Aid nor LSC will pay any contractor costs associated with preparing responses or proposals submitted in response to this RFP.

EVALUATION OF PROPOSALS

The evaluation team will first evaluate the technical proposals and score them as described below. These scores will be used to create a short list of firms for further consideration; Respondents not on the short list will not be eligible for further consideration.

After the final technical proposal scores have been calculated, the price proposals will be evaluated and scored, with a total score for each Respondents to be calculated. LSLA will then select one finalist. Should LSLA and that finalist not be able to negotiate an agreement, LSLA reserves the right to select and negotiate a contract with a new finalist. Candidates not selected will be notified by email after a contract is finalized.

The total score available will be 100 points. The proposals will be evaluated using the criteria below.

- **Knowledge and experience**: Proposals will be evaluated on the certifications described in the SUBMISSION REQUIREMENTS section above and Respondent's collective knowledge and experience with technologies relevant to the project. Included in this will be Respondent's experience with www.texaslawhelp.org and with Texas Legal Services Center.
- **Quality of work plan submitted**: Proposals will be evaluated on the quality of the work plan submitted.
- **Quality of samples of prior work**: Proposal will be evaluated based on the quality of samples provided.
- **Proposed fees**: Proposals will be evaluated on the reasonableness of proposed fees.
- **Estimate of time required**: Proposals will be evaluated on how long it is estimated to take to accomplish the project goals.

LSLA RIGHTS

LSLA reserves the right to:

- Accept or reject any or all responses, or any part thereof.
- Waive any informalities or technicalities contained in any response received.
- Conduct discussions with respondents and accept revisions of proposals after the closing date.
- Make an award based upon various selection criteria.
- Request clarification from any respondents on any or all aspects of its proposals.
- Cancel or re-issue this RFP at any time.
- Retain all proposals submitted in response to this RFP.
- Invite some, all, or none of the respondents for interviews, demonstrations, presentations, and further discussion.

CONFIDENTIALITY

During the selection and project execution phases, LSLA may give you access to LSLA's confidential or proprietary information. You agree not to use this information for your or any third-party's benefit and will not disclose this information to any person who does not have a need to know.

LSLA will not under any circumstances disclose any information submitted by Respondent to any other Respondents, except the questions and answers described above. LSLA will not disclose any information submitted by Respondent to LSLA to any other parties until after the contract is finalized.

FREEDOM OF INFORMATION ACT

The Freedom of Information Act (FOIA) and associated federal regulations may require LSLA to disclose certain documents to the public, including portions of your proposal. Generally, LSLA will not release any documents that would cause competitive harm to a Respondent or potential Respondent.

You are encouraged to label any confidential information contained in your proposal to facilitate LSLA's ability to withhold it from disclosure.