

**Request for Proposal**  
**Developer for Automated Pro Se Consumer Form**

**We will consider all responses that are sent to the RFP Coordinator, Alex Clark, at [aclark@mtlsa.org](mailto:aclark@mtlsa.org) by 5:00 pm MDT on March 31, 2021. Please include the name of the project, “Developer for Pro Se Consumer Form” in the subject line. All vendor communications concerning this Request for Proposal must be directed to [aclark@mtlsa.org](mailto:aclark@mtlsa.org). Any oral communications will be considered unofficial and nonbinding on MLSA. Only written statements issued by the RFP Coordinator may be relied upon.**

**PROJECT SUMMARY**

Through this Request for Proposal (RFP), Montana Legal Services Association (MLSA) is soliciting responses from vendors interested in developing an Automated Pro Se Consumer Form.

Using HotDocs and A2J document automation software, the vendor will automate an interactive pro se answer form for debt collection lawsuits for use in Montana State Courts. A sample answer form is included in this RFP as Attachment A. The sample is provided for reference purposes only and the text of the form will be revised to include optional Affirmative Defenses that the user may select.

**WHO WE ARE**

MLSA is a law firm that empowers low-income people by providing legal information, advice, and other services free of charge. Our mission is to protect and enhance the civil legal rights of, and promote systemic change for, Montanans living in poverty. MLSA accomplishes its mission by engaging with the low income community in Montana to become their advocates to change the systems that keep people in poverty.

**PROJECT DESCRIPTION**

The objective of the project is to automate an answer form for debt collection lawsuits using HotDocs and A2J automation software for use by pro se users, legal aid staff, pro bono attorneys, and paralegals in Montana. The HotDocs form will be geared toward legal aid staff, pro bono attorneys, and paralegals. The A2J form will be geared towards pro se end users. After delivery of the beta version of the form, the vendor will engage in revision and refinement of the form based on feedback from internal and end user testing to ensure that the form is working as intended. For a limited period to be determined by the vendor and MLSA, the vendor will also assist in debugging/refining the forms as needed after public launch.

**PROJECT SCHEDULE**

<b>Objective</b>	<b>Deadline</b>
RFP released	March 2, 2021
Responses due no later than 5pm MDT	March 31, 2021
Successful vendor announced by	April 9, 2021
Contract signed and work commences by	May 7, 2021

Internal QA testing of the Pro Se Consumer Form begins by	July 1, 2021
End user testing of the Pro Se Consumer Form begins by	September 1, 2021
Complete development of beta version of Pro Se Consumer Form by	December 31, 2021
Revisions to Pro Se Consumer Form based on roll-out feedback and further usability testing are completed by	April 1, 2022
Automated Pro Se Consumer Form is finalized by	May 1, 2022

**PAYMENT**

Payment arrangements will be negotiated with the successful vendor and may include monthly invoices with 30-day net terms, or 3-4 installments based on agreed upon milestones. With any payment arrangement, the final invoice or payment will be made upon satisfactory completion of revisions based on usability testing and evaluation results.

**THE INFORMATION WE NEED**

For consideration, please provide:

1. Vendor’s Name, address, federal tax identification number or Social Security Number (SSN), Uniform Business Identifier (UBI) number, 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 MLSA may accept any time within the 60 day period.
4. A statement on whether the vendor or any employee of the vendor is related by blood or marriage to an MLSA employee or resides with an MLSA employee. 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 two (2) references for other automated documents or similar projects you have completed. Please include a link to access the finished product and a phone number or email address of the referenced individual so he/she may be contacted.
7. Provide an estimated number of hours you believe the project will take.
8. Provide a statement of your hourly rate and any other information about your compensation requirements.

Proposals that exceed 10 pages in length will not be accepted. Late proposals will not be accepted and will be automatically disqualified from further consideration. Vendors must respond to each question/requirement listed above. In preparing their response, vendors should

restate each requirement and then give their response.

### **SELECTION CRITERIA**

We will consider all responses that are sent to [aclark@mtlsa.org](mailto:aclark@mtlsa.org) by 5:00 pm MDT on March 31, 2021. Please include the name of the project, "Developer for Automated Pro Se Consumer Form" in the subject line.

The following will be key factors in our decision-making process:

- Demonstrated commitment to exceptional customer service and responding to client requests in a timely fashion
- Experience working with legal aid organizations on automated document projects
- Past performance working with MLSA (if applicable)
- Price that is commensurate with the value offered by the firm/individual and ability to work within a budget
- Responses are presented in a clear, organized, and logical manner
- Candidate has successfully completed similar projects and has the qualifications necessary to undertake this project
- Can demonstrate detailed-oriented nature

**ATTACHMENT A**

\_\_\_\_\_  
(your name)

\_\_\_\_\_  
(your street address)

\_\_\_\_\_  
(city, state, zip code)

\_\_\_\_\_  
(your phone number)

Defendant Pro Se

MONTANA \_\_\_\_\_ JUDICIAL DISTRICT COURT,  
(number of district in which your county is located)  
\_\_\_\_\_ COUNTY  
(name of your county)

\_\_\_\_\_, ) **Cause No.**  
 )  
 ) **ANSWER TO COMPLAINT**  
 Plaintiff, )  
 )  
 vs. )  
 )  
\_\_\_\_\_, )  
 )  
 Defendant. )

COMES NOW \_\_\_\_\_, the Defendant in this cause of action and responds to the  
Complaint filed in this matter as follows:

1. These paragraphs in the Complaint are true. I admit them (*list the paragraph numbers that  
are true*):

\_\_\_\_\_  
\_\_\_\_\_.

2. These paragraphs in the Complaint are not true. I deny them (*list the paragraph numbers that are not true*):

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3. These paragraphs in the Complaint are partly true and partly not true. I admit the parts that are true and deny the parts that are not true (*for each paragraph that is partly true and partly not true, list the paragraph number and tell the Court what is not true*):

A. Paragraph No. \_\_

Everything in this paragraph is true except for (*state the part of the paragraph that is not true*):

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B. Paragraph No. \_\_

Everything in this paragraph is true except for (*state the part of the paragraph that is not true*):

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C. Paragraph No. \_\_

Everything in this paragraph is true except for (*state the part of the paragraph that is not true*):

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