

Request for Proposal
Usability Testing of Consumer Financial Stability Tools

We will consider all responses that are sent to the RFP Coordinator, Alex Clark, at aclark@mtlsa.org by 5:00 pm MDT on March 31, 2021. Please include the name of the project, “Usability Testing Vendor” in the subject line. All vendor communications concerning this Request for Proposal must be directed to 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 to conduct usability testing on: an automated pro se answer form for debt collection lawsuits; a garnishment calculator for consumers; and a consumer debt tool. The form, calculator and consumer debt tool are collectively identified as Consumer Financial Stability Tools (hereafter “Tools”).

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

MLSA received a Technology Initiative Grant from the Legal Services Corporation to develop Tools including: an automated interactive pro se answer form to make it easier for users to respond to lawsuits; a garnishment calculator to accurately compute the amount of income a user could be garnished based on answers to a guided interview about type of debt and total income, as well as relevant state and federal law; and a consumer debt tool to identify possible claims, defenses, and exempt income, and to provide resources on common consumer questions. The consumer debt tool will use branching logic and a guided interview process to provide targeted legal information to users with debt-related legal problems.

MLSA is currently soliciting proposals for usability testing of the Tools. The usability testing vendor will work with MLSA staff, community partners, and clients to ensure that the Tools developed are user-friendly for self-helpers. The vendor will identify revisions needed to enhance the usability of the Tools, and will review and test subsequent versions of the Tools to ensure that the modifications were implemented. The vendor will also provide data in support of the project evaluation, including pre and post usability test results, and end-user feedback.

PROJECT SCHEDULE

Objective	Deadline
RFP released	March 2, 2021
Responses due no later than 5pm MDT	March 31, 2021
Successful vendor announced by	April 9, 2021
Vendor submits a workplan and timeline for approval	April 16, 2021
Contract signed and work commences by	May 7, 2021
Internal QA testing of the Garnishment Calculator and Consumer Debt Tool begins by	July 1, 2021
Usability testing of Tools with MLSA staff, community partners, and clients begins by	September 1, 2021
Usability testing of Tools is completed by	March 31, 2022
Additional testing of revisions based on evaluation	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 final usability testing tasks.

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 a summary of your usability testing methodology.
7. Provide two (2) references for similar projects you have completed. Please include a phone number or email address of the referenced individual so he/she may be contacted.
8. Provide an estimated number of hours you believe the project will take.
9. 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 by 5:00 pm MDT on March 31, 2021. Please include the name of the project, "Usability Testing for Consumer Tools" 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