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**Request for Proposal:
Custom Software Development:
LACI Updates**

Feb 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. The objective is 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 March 15, 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 May 30, 2026.

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.

In the past, this challenge has consumed hundreds of hours of attorney time in reviewing legal authorities, understanding what’s changed, and identifying which of these require us to make changes in the legal information documents that we have written.

We wrote the LACI software to make this task far easier.

LACI, the Legal Aid Content Intelligence software system, 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. The modules are:

- **laci_core**: A main module that implements 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.
- **laci_texas**: A state-specific module that can access Texas statutes, regulations, and rules.
- **laci_lsla**: A module specific to LSLA loads in these two, the LACI theme, and sets up some LSLA-specific configuration for our environment.

While the system will currently only check Authorities on the federal level and in the Texas statutes, the code has been designed to be easily extensible. The ability to monitor additional states' statutes can be added through the module system — that is, by developing and activating a module similar to **laci_texas** for the relevant state.

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/laci-code>.

WHAT WE NEED

For this project, LSLA is looking for a software development partner (“Respondent”) who is a Drupal module development expert and who can help us with at least the following changes to LACI:

1. Currently when LACI detects an external change to an Authority, it presents to the reviewer both the old text and the new text of the Authority. This approach can make it difficult to determine precisely what has changed, especially for large texts. Change LACI to instead present updates as “diff”, “review”, or “redline” format, which makes it much clearer what has been updated.
2. While LACI can access individual statutory or regulatory sections (e.g., 12 CFR 1002.2), some of these are very large and comprise many sub-sections. Update LACI’s “parser” to support references to sub-section elements such as 12 CFR 1002.2(b), or 12 CFR 1002.2(c)(2). Support as granular a reference as possible.
3. LACI has the ability to monitor individual sections of a general web page, so changes outside that section are not flagged as updates. For example, LACI can be configured to ignore navigation, sidebar, and footer elements on a page; changes to these are typically not important for us to know about. This is currently accomplished by giving LACI an “XPath expression” along with the URL to monitor. However, coming up with “XPath expressions” is not user-friendly. Instead, develop a point-and-click user experience to allow an editor to monitor a section of a web page by pointing to it. Examples of this include uBlock Origin’s “element picker”, or www.wachete.com’s user interaction to monitor sections of a web page.

4. Adding to the events and data we collect and report. To this end, we need to track when the Document “last modified date” changes and its subsequent resolution with a review of its attached Authorities. We also need to keep track of Authority error events, so we can see how often particular Authorities (or their host sites) are throwing errors on checks.

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, discuss how you would approach implementation in each phase, and feel free to recommend any additional or alternate approach.

1. **Discovery.**

During the initial phase of the project, meet with LSLA team and supporters from other organizations 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 typically takes between two and four calendar weeks of the project.

2. **Add more metrics to be collected and monitored.**

Implement the following additions to LACI:

- a. For Authorities, we have [Authority]Change, [AuthorityDoc]Review, and [AuthorityDoc]ReviewHistory. However for Document changes, we don't keep history, so we only know about the current LastModifiedDate and latest ReviewedDate, and we don't know who did the last review.

Proposed: create a **DocumentChange** entity. A DocumentChange is created when LastModifiedDate changes, and it is created in Pending state. When the "Authority Review Complete" is checked, change the open DocumentChange to Closed and record ClosedBy and ClosedDate.

- a. A list of DocumentChange records should be viewable (maybe initially collapsed) in the AuthoritiesReview section?
- b. DocumentChange should have at least the following fields:
 - i. EntityReference: Document
 - ii. Term: Status (from Review status)
 - iii. EntityReference(multiple): User (monitorsAtTimeOfCreation)
 - iv. EntityReference(single): User (closedby)
 - v. Date: closedDate

Currently, in LACI, documents are flagged for needing an "authorities review" when the document's LastModifiedDate is more recent than the last ReviewedDate. Instead, the system should show that "authorities reviews" are required when there are

DocumentChange entities with a status of “Pending.” Further, when a user clicks to indicate that the review has occurred, the system must update the status of the DocumentChange entity with a status of “Completed.”

Similarly, the notification system must be updated so that monitors are notified when documents have a DocumentChange of “Pending,” rather than when their documents have a LastModifiedDate that’s more recent than the last ReviewedDate.

- b. On Authorities, we only track the latest HTTP Error. This means we don’t have a full view of how many times an Authority check is failing, and it makes it harder for us to identify web servers that are failing for multiple Authorities (e.g., multiple Authorities being served from the same web server).

Proposed: create an **AuthorityError** entity. An AuthorityError entity is created when a “Change-eligible Authority check” fails.

- a. A “Change-eligible Authority check” is an Authority check that could potentially create a Change record if the text of the Authority has changed. There are conditions under which an Authority check is not “Change-eligible”, one of which is when an “Authority test” is performed on the Authority page to confirm it’s working.
- b. The Authority view page should probably include a view of its AuthorityError history, probably in an initially-collapsed section.
- c. AuthorityError should have at least the following fields:
 - i. EntityReference: Authority
 - ii. Date: date of error
 - iii. Text: host of the site serving the document
 - iv. Integer: HTTP status code
 - v. Boolean: is connection error (not an HTTP error)
 - vi. Boolean: currently active
 - vii. Text: for HTTP error, any returned Body with the error response. For connection error, the type of connection error (typically TIMEOUT).

Acceptance criteria: Confirmation that entities of the relevant types are created under the circumstances described above.

3. **Develop and deliver: Authority parsing at the sub-section level and at the chapter level.**

A statutory or regulatory section is typically a more granular reference within a “chapter” or “part”. For example, Tex. Prop. Code 92.0081 is in Texas Property Code Chapter 92, section .0081. A reference to 12 CFR 1002.2 is in Title 12, Part 1002, section .2.

While LACI can access individual statutory or regulatory sections (e.g., 12 CFR 1002.2), some of these are very large and comprise many sub-sections. We’d like to update LACI’s “parser” to support references to sub-section elements such as 12 CFR 1002.2(b), or 12 CFR 1002.2(c)(2). In other words, to support as granular a reference as possible.

In addition, there are some cases where the Chapter or Part is so small that it would be convenient to refer to the whole instead of its sections. For example, to allow a reference to Tex. Prop. Code 24 or 12 CFR 1002.

The current approach of only allowing references at the “section” level can lead to extraneous “false positives” when Authorities update. For example, if our document only cares about 12 CFR 1002.2(c)(2), and LACI sees that 12 CFR 1002.2(d) changes, LACI will alert us that a change has taken place in 12 CFR 1002.2, because that’s “as granular” as it can understand the Code of Federal Regulations. We’d like to reduce these false positives where possible.

Each Authority source type has its own code to access and parse external data because each Authority publisher is potentially different. It may turn out that not all Authority types can be parsed to a sub-section granularity or be accessed as a whole Chapter or Part. Nevertheless, all existing Authority types except **General Website** and **General PDF** must be explored for the potential to be parsed to a sub-section or in aggregate at the Chapter or Part.

In addition, a single unified representation of a statute section, rule, or regulation must be developed. The representation must have minimal if any HTML markup, and no external references such as anchors, scripts, images, etc. The representation must have, to the extent possible, internal XML structure that allows referencing the sub-section parts. For example:

```
<section|rule|regulation>Title information or some preceding introductory text.
  <part name="a" ref="(a)">This is a first sub part.</part>
  <part name="b" ref="(b)">This is a second sub part, with parts.
    <part name="i" ref="(b)(i)">This is the first sub sub part</part>
    <part name="ii" ref="(b)(ii)">This is the second sub sub part.
      <part name="A" ref="(b)(ii)(A)">And so on</part>
    </part>
  </part>
</part>
<annotations|comments>These are some non-authoritative comments or
annotations that are not part of the statute or rule but have information about
interpretation or implementation
  <annotation>here's one</annotation>
</annotations>
</section>
```

Each qualifying Authority type would need to have its validation code updated to allow sub-section and/or Chapter/Part references, store its data in the unified representation format, correctly access the sub-section or Chapter/Part reference during “Test Authority”, and correctly report only the relevant text when reporting a change to the Authority for review.

Acceptance criteria: A single data representation is developed for all statute sections, rules, and regulations, and all relevant Authorities are adapted to store their data in that format. Each “root Authority” type that is codified in sections (e.g., Texas Statute, Texas Rules, Federal Code,

Federal Rules, etc.) evaluated to determine how “granularly” it can be parsed. For each “root Authority” type that can be parsed more or less granularly than the existing “section”, adapt the type to allow references to the sub-section and/or Chapter/Part level, and demonstrate success analyzing and reporting changes at that level.

4. **Develop and deliver: a “redline” change review format.**

Currently when LACI detects an external change to an Authority, LACI presents to the reviewer both the old text and the new text of the Authority so the editor can determine whether the change is relevant to the underlying document. However, the way this is currently implemented can make it difficult to determine what’s changed, especially for large texts. Change LACI to instead present updates as “diff”, “review”, or “redline” format, which makes it much clearer what has been updated.

Example of current functionality:

Old Text:	New Text:
<p>This is an example of the previous version of the Authority section. It’s got:</p> <ul style="list-style-type: none"> (a) One thing, (b) Two things, and (c) A third thing. <p>Find the changes.</p>	<p>This is an example of the current version of the Authority section. It’s got:</p> <ul style="list-style-type: none"> (a) One thing, (b) Two things, or (c) A third thing at the end. <p>Find the changes.</p>

An example of what we want LACI to do:

Authority Text:
<p>This is an example of the previouscurrent version of the Authority section. It’s got:</p> <ul style="list-style-type: none"> (a) One thing, (b) Two things, andor (c) A third thing at the end. <p>Find the changes.</p>

This is just an example. Other possibilities include “diff” format (whole lines), or another option we haven’t yet thought of.

This will likely be easier to accomplish after the development of the single unified representation of a section, rule, or regulation is developed as described in the preceding deliverable.

Acceptance criteria: Each Authority change is displayed to the LACI user in a format that shows changes as insertions and deletions, perhaps with color to help identify the changes. User acceptance by reviewers and editors at LSLA as well as any other adopting partners is essential.

5. **Develop and deliver: an interactive method for choosing a section of a web page.**

LACI has the ability to monitor individual sections of a general web page, so changes outside that section are not flagged as updates. For example, LACI can be configured to ignore navigation, sidebar, and footer elements on a page; changes to these are typically not important for us to know about. This is currently accomplished by giving LACI an “XPath expression” along with the URL to monitor. However, coming up with “XPath expressions” is not user-friendly. Instead, develop a point-and-click user experience to allow an editor to monitor a section of a web page by pointing to it.

Examples of a point-and-click user experience include:

- www.wachete.com : website monitoring that allows users to select portions of a page to monitor.
- [uBlock Origin Browser Extension](#): allows a user to choose a portion of a web page to “block” by pointing to it.
- [Selenium IDE extension](#): for each step in a browser-based test, point-and-click can be used to select an element.
- Browser-based “Developer Tools” – “inspect” function: Both Chromium- and Firefox-based browsers include the ability to “inspect” an element by pointing and clicking.

If the development of this feature requires a browser extension, both Firefox and Chrome-based browsers must be supported. The source code for the Selenium IDE extension v3, which supports both, is available under the Apache v2 license and could be used as a starting point.

The requirement for this milestone is to support these tasks:

1. New Authority:
 - a. select a web page by URL,
 - b. user interacts with that page to choose an element/div/frame to monitor,
 - c. LACI calculates XPath to selected element and stores XPath expression into existing (editable) selector field.
2. Edit Authority:
 - a. (press button?),
 - b. LACI takes existing XPath selector field and URL, highlights current monitored element (or none if the page has changed),
 - c. user interacts with that page to display the current selection,
 - d. allow user to choose new element,
 - e. LACI calculates XPath to selected element and stores XPath expression into existing (editable) selector field.

While it’s not strictly necessary for acceptance as below, it would be pretty neat to figure out how to develop this functionality as a separate Drupal/PHP module that could be used in Drupal projects other than LACI.

Acceptance criteria: Each General Website Authority allows a reviewer to use an interactive experience to calculate the relevant XPath and fill in the current selector field that defines the section of the page that LACI will monitor. The “Test Authority” button continues to use the

XPath selector field, which continues to be directly editable. User acceptance by reviewers and editors at LSLA as well as any other adopting partners is essential.

6. **Ongoing: changes as necessary to respond to issues and component updates.**

Changes to underlying components and emergent software performance issues may require patches in response. Software must continue working with the most recent point release of Drupal 10 (e.g., 10.5) available before contract end.

We expect these contingencies to represent no more than 5% of the overall budget.

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

Effort required to fix any bugs and to bring software into compliance with the project specifications, particularly in response to any findings during the Evaluation phase. 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.

COMMUNICATIONS WITH LSLA

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

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 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.

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.
- 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

Applicant 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

Currently we prefer to communicate via email. As the proposal process progresses, we will make ourselves available for phone calls and possible in-person meetings. 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 Updates TIG24**” 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.

- February 3, 2025: RFP opens.
- Through March 15, 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.

- March 15, 2025, 5:00 PM US/Central: Deadline for Respondents to submit responses.

COST OF RESPONSES NOT INCLUDED IN 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.
- **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 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.