Evaluation of the Legal Aid Services of Oklahoma Expungement Project  
Request for Proposals issued April 30, 2015

Legal Aid Services of Oklahoma, Inc.  
907 S. Detroit Avenue, Suite 725  
Tulsa, OK  74120

Request for Proposal
The objective of this Request for Proposal (“RFP”) is to engage a qualified program evaluation consultant or firm (“Evaluator”) to measure and assess the project goal to implement a new technology-facilitated pro bono model to increase and enhance services pro bono attorneys provide to self-represented litigants. Through this RFP process Legal Aid Services of Oklahoma, Inc. is soliciting written proposals that identify consulting capabilities, assessment of our scope, deliverables, and pricing.

Background and Overview of Project
Legal Aid Services of Oklahoma, Inc. (LASO) (www.legalaidok.org) is a statewide non-profit law firm in Oklahoma, working to increase access to justice for low-income Oklahomans who face civil legal problems. LASO has law offices across the state of Oklahoma staffed with advocates who represent low-income people in civil legal matters. With limited funding, LASO does not have the staff to represent or advise every eligible low-income person with a legal problem.

Limited resources at LASO mean many low-income individuals must represent themselves without help from a lawyer, or with limited assistance from a pro bono or LASO advocate. LASO supports these “pro se litigants” by providing online information and court forms to guide the litigant through the court process. Utilizing the innovative and effective use of technology, LASO collaborates with other non-profit organizations in the legal sector to provide automated document programs for these litigants to develop forms and materials to initiate and complete a court case.

In some cases, LASO works with pro bono lawyers to provide legal services to low-income clients. In some counties, specifically more rural counties, LASO has little or no success finding pro bono attorneys to take cases for low-income litigants. This project seeks to wed technology currently used to support pro bono lawyers and to provide online services to pro se litigants and increase, and enhance the services pro bono lawyers can provide pro se litigants seeking to expunge criminal history records in Oklahoma.

LASO is developing online materials and an online documents program to address the needs of pro se litigants seeking to expunge criminal records, by:
- creating a new design on the OKLaw.org website, called a GuideMe Module, to deliver resources in a new, more intuitive manner;
- creating information resources, FAQ’s, instructions for seeking pro bono assistance from Legal Aid and instructions for seeking to expunge court and arrest records;
- modifying the “Events” feature of LawHelpInteractive to allow pro bono coordinators
and pro bono lawyers to work with an individual pro se litigant to deliver limited scope legal services; and,

- reviewing, redesigning court forms and instructions for litigants seeking to expunge court and arrest records.

**Scope of the Evaluation**

The over-arching project goal is to, in partnership with the Tulsa, Mayes and Okmulgee County District Courts, use HotDocs/A2JA guided interviews and instructions to improve the ability of low-income Oklahomans to easily, effectively and efficiently produce and file court forms, without the assistance of a lawyer. The Evaluation plan approved by the major funder is attached to, and made a part of, this RFP.

This is a multi-year project ending July 31, 2016. The evaluation is to be completed and submitted to LASO no later than September 30, 2016.

1. LASO will work with the Evaluator as Evaluator designs the evaluation framework, methodologies and instruments.
2. Evaluator will work with LASO to guide the data collection with LASO staff and community partners.
3. Evaluator will complete the final document or report, submitting to LASO on or before September 30, 2016 and according to the guidelines set forth in the Requirements section above and based on the Final Report Samples of Replicable Projects found at this link: http://tig.lsc.gov/grants/who-qualifies/final-report-samples-replicable-projects

**Responses**

Direct questions regarding your response may be addressed at the bidders conference held via online meeting on Wednesday, May 6, 2015, 4:00 p.m. Central Time.

Register for the bidders conference here: https://attendee.gotowebinar.com/register/8730853865960183554

After registering, you will receive a confirmation email containing information about joining the webinar.

Please submit your proposal by Thursday, May 21, 2015.
Your response should be submitted via email to: margaret.hamlett@laok.org
OR by mail to:
Margaret Hamlett
Legal Aid Services of Oklahoma, Inc.
907 S Detroit Avenue, Suite 725
Tulsa, OK 74120

**Timing of Project**

All responses are due by 5 p.m. Central Thursday, May 21, 2015.
Notice of selection will be sent to those submitting timely and complete applications by Friday, May 29, 2015.
Applicants must be able to negotiate and sign a contract before June 30, 2015.
The evaluation is to be completed and submitted to LASO no later than September 30, 2016.
Pricing for Project Components – Total Budget $10,000
Design of the evaluation framework, methodologies and instruments
Coordination of the data collection (project staff and stakeholders may assist in administering surveys, coordinating focus groups, etc.)
Analyzing the data
Document, or report, presenting the data in the prescribed format (see below)
Travel expenditures
Other project costs
Your proposal should include deliverables and pricing.

Requirements
1. Initially, the Evaluator will work with LASO and other project partners to determine the scope of the evaluation and define an approach.
2. LASO will collect end user data, including general technology usage and experience using the methodologies and instruments designed by the Evaluator.
3. Evaluation will collect data as required by the Evaluation Plan, and on the:
   a. pro se litigants’ ability to access and effectively use the online information and the GuideMe Module.
   b. pro se litigants’ ability to access and effectively complete the guided interviews, utilizing informational materials to learn if the user qualifies for an Expungement; to obtain a criminal history report; to return to the online information, to complete accurate pleadings, and to request assistance of a pro bono lawyer.
   c. pro bono coordinator and event coordinator ability to use the Event feature to initiate and use the process to assign pro bono lawyers to a pro se litigant.
   d. pro bono lawyer’s ability to use the Event feature to initiate and use the process to assign pro bono lawyers to a pro se litigant.
   e. pro bono lawyer’s ability to complete the pleadings and communicate with the pro se litigant using the Event feature.
   f. pro se litigants’ ability to use the materials to complete the court process.
4. Evaluation document or report should follow the following format more completely set forth at this link: http://tig.lsc.gov/sites/default/files/TIG/TIG_Final_Eval_Format_1_.pdf
   a. Project Goals and Objectives
   b. Evaluation Data and Methodologies
   c. Summary of Major Accomplishments, Recommendations and Future Steps
   d. In-Depth Analysis of Accomplishments
   e. Information for Multi-year or Multiple Projects
   f. Factors affecting project accomplishments
   g. Strategies to address major challenges
   h. Major lessons and recommendations
5. Evaluation will include both quantitative analysis and qualitative analysis.
6. Evaluation document or report will be completed and submitted to LASO no later than September 30, 2016.

Consultants Minimum Desired Qualifications
Minimum Qualifications include:
1. Ability to conduct business in the State of Oklahoma.
3. A minimum of five years of experience providing large-scale program evaluation.
4. Ability to travel to or meet with LASO staff in a meaningful way to facilitate the project evaluation.

Desired Qualifications include strengths/abilities in the following areas:
1. Existing strategies that are applicable and practical for evaluating the impact of technology on legal/social services delivery.
2. Familiarity with the non-profit legal services sector.
3. Experience using resources effectively and efficiently.
4. The ability to:
   a. Use and adequately design an evaluation process that is appropriate for its intended purpose.
   b. Deliver projects on time and within budget.
   c. Gather and use reliable and accurate data for evaluation purposes.
   d. Provide clear and concise program evaluations and recommendations.
   e. Communicate and develop evaluations without errors, biases, misconceptions, or distortions.
   f. Provide program evaluations that address the specific needs and expectations of program objectives, purposes, and outcomes.
   g. Justify conclusions and recommendations in evaluations.
   h. Provide evaluations that serve intended purposes and can be easily understood and utilized.
   i. Develop transparent descriptions of findings, limitations, conclusions, and recommendations.
   j. Identify and address real or perceived conflicts of interest that may compromise the evaluation.
Project Goal: Create and implement a new technology-facilitated pro bono model to increase and enhance services pro bono attorneys provide to self-represented litigants (SRLs).

Project Objective 1:

- Develop and implement technical functionalities to enhance the services pro bono attorneys provide self-represented litigants (SRLs) seeking to expunge their criminal history.

Strategies / Activities:

- Develop partnership between Legal Aid, Pro Bono Net, Community Outreach partners to implement the project.
- Develop and implement enhanced functionalities to the LawHelp platform to enhance user access to information on expungements.
- Develop and implement functionality to the GuideMe module (LawHelp platform) to enhance user access to information on expungements.
- Develop partnerships between Legal Aid, Pro Bono Net, Community Outreach partners to implement the project.

Evaluation Data:

- Test the usability of enhanced LHI Event feature and the GuideMe resource module with users.
- Develop and implement enhanced functionalities to the LawHelp platform to enhance user access to information on expungements.
- Develop and implement enhanced functionalities to the GuideMe module (LawHelp platform) to enhance user access to information on expungements.
- Test the usability of enhanced LHI Event feature and the GuideMe resource module with users.
- Develop partnerships between Legal Aid, Pro Bono Net, Community Outreach partners to implement the project.
Project Objective 2:

Enable SRL's to effectively apply for pro bono assistance and produce accurate pro se pleadings by creating and implementing informational materials through the newly created GuideMe resource module and A2J/HotDocs guided interviews.

Strategies / Activities:

- Develop accurate informational materials and online court forms consistent with internal pro bono requirements and court requirements.
- Develop HotDocs/A2J interviews for pro bono attorneys and SRL use.
- Test HotDocs/A2J interview with staff attorneys/advocates and potential users.
- Revise templates and materials based on feedback.
- Contract with Evaluation and Plain Language contractors.
- Submit informational materials to Plain Language contractors.

Evaluation Data:

- List and description of and links to resources and guidance materials.
- Description of test protocols implemented (including usability testing), significant test results and notable changes made in interviews.
- Results of user surveys re: usability, usefulness and suggestions for improvements of resources and guidance materials.
- Quantitative usage data for A2J/A2J interviews by pro bono attorneys.

Project Objective 3:

Increase pro se users’ ability to access and effectively complete the HotDocs/A2J interviews by developing and implementing LiveHelp support provided by law students.

Strategies / Activities:

- Develop partnership with Law Schools to create internship or externship for Law Students to assist with LiveHelp access for pro se litigants.
- Integrate LiveHelp with the GuideMe resource module and A2J/A2J interview.

Evaluation Data:

- Description of training activities, such as trainings conducted, trainee data (e.g., # trained, employers), training evaluation data for Law Students.
- Quantitative usage data for the A2J/A2J guided interview.
- Quantitative usage data for the GuideMe resource module.
- Quantitative usage data for A2J/A2J interviews by pro se litigants.

Project Objective 3:

Enable SRL to more effectively apply for pro bono assistance and produce accurate pro se pleadings by creating and implementing informational materials through the newly created GuideMe resource module and A2J/A2J guided interviews.
### Project Objective 4:
**Increase the number of pro bono attorneys participating in LASO’s pro bono expungement program in rural areas by recruiting and training pro bono lawyers to work with SRLs using the newly created technology.**

**Strategies / Activities:**
- Develop and implement a plan for recruiting and retaining pro bono attorneys.
- Develop and implement a community education and outreach plan for online resources and court forms.

**Evaluation Data:**
- Number of pro bono attorneys using the online system.
- Number of pro bono attorneys assisting SRLs.
- Pre- and post-implementation data on number of SRLs assisted by pro bono attorneys.
- Survey data on pro bono attorneys and SRLs for ease of use, usefulness, and suggestions for improvement of system.

### Project Objective 5:
**Conduct community education, outreach and training of program staff and partners to maximize usage of interviews.**

**Strategies / Activities:**
- Develop and implement a community education and outreach plan for online resources and court forms.
- Train community outreach partners to use the online systems to assist SRLs.

**Evaluation Data:**
- Survey data on pro bono attorneys and SRLs for ease of use, usefulness, and suggestions for improvement of system.
- Number of SRLs using completing A2LA’s guided interviews.
- Pre- and post-implementation data on number of SRLs assisted by pro bono attorneys.
- Description of training activities, such as trainings conducted, trainee data (e.g., # trained, employers), trainee evaluation data.