Request for Proposal: Chatbot

Community Legal Services of Mid-Florida, Inc. d/b/a Community Legal Services - CLSMF.org - Issue Date: December 5, 2022

Timeline Overview
Questions Due: December 19, 2022
Proposals Due: January 5, 2023
Vendor Announced: January 23, 2023
Projected Start Date: March 13, 2023

Project Summary
Community Legal Services (CLS) seeks to contract with a vendor to add a chat system to its website. Ultimately, the chatbot shall respond to applicant requests for general information, integrate with a booking system, and serve as an additional point of access to CLS’s services. The chatbot should respond to field of law specific questions by directing users to resources or intake methods associated with those fields of law.

Deliverables: A fully developed chatbot, made to CLS specifications and ready for use by the public. Specifications listed in Project Specification & Scope of Work section.

Budget: We have budgeted up to $80,000 for this project, which includes four phases of the project.

Point of Contact: Eli Mattern (she/her), Director of Technology, elim@clsmf.org. Please direct all questions or other requests to Ms. Mattern.

Timeline: This project will likely run from March 2023 to August 2024. Deliverables for each phase of the project will be discussed with the selected vendor.
Project Specifications & Scope of Work

The vendor will perform the following tasks and provide the following deliverables:

- **Phase I: Discovery/Planning**
  - Meet with CLS staff to outline project details and make detailed project plan.

- **Phase II: Chatbot MVP Development**
  - Using DialogFlow, Intercom, or a similar platform, develop a friendly, plain-language AI-powered chatbot to assist users of CLSMF.org.
  - Work closely and collaboratively with CLS staff to ensure:
    - The chatbot upholds our ethical values and duties around user privacy and handling of user information.
    - Collaboration with managed services provider to achieve interoperability with the clsmf.org, a Wordpress site and custom theme/style sheets.
    - Accessibility: to ensure access for disabled users or those utilizing assistive technology.
    - Clear, helpful, and friendly presentation of information to users.
    - As much as possible, the tool should be built with the intention of future development – that is, that CLS staff will have the capability to make changes and adjustments over the life of the tool (to include new areas of law, account for current disasters, or accommodate grant changes) and to perform updates when things such as our hours, services, or office locations change.
    - Assist CLS with user-testing with both internal and external stakeholders, so that learnings can be incorporated into version 2 of the chatbot.

- **Phase III: Chatbot v.2&3: Integrations and Revisions based on User-Testing**
  - Work with CLS staff to deploy a calendaring/booking integration for the chatbot. CLS anticipates using an off-the-shelf service to effectuate this functionality, such as Microsoft Bookings, Calendly, or some similar technology. We will also evaluate the possibility of integrating with a service which would send chats to email as well.
  - Integration with simplified document building services within the chatbot (this opportunity to be evaluated during the project discovery phase with the selected vendor).
  - Ideally, CLS would like to launch 3 iterations of the app over the course of the project timeline, which responds to feedback from staff and users.

- **Phase IV: Training & Reporting**
  - Integrate or provide a reporting mechanism for CLS review of chatbot outcomes.
  - Incorporated Google Analytics for reporting as much as is practicable.
  - Sufficiently train staff to assume responsibility for the chatbot.
The scope of work for this project **does not** include:

- Content authoring, and any content-related work. CLS staff will provide specific language to be used in the chatbot. Although advice and best practice suggestions are always welcome.
- Costs associated with running the system. Saas products, hosting, or other services will be paid for by CLS.

Proposals may be submitted which encompass some but not all of the project specifications if a vendor believes there is insufficient time or budget to execute the requested task well.

Stakeholders we anticipate the vendor to work with:

- **External**
  - CLS’s website vendor for the purpose of deploying the newly created chatbot.
  - **Project evaluator** who will assist with the user-tests conducted between the MVP Phase and v.2 Phase.

- **Internal**
  - **CLS Helpline** – who have previous experience with chatbot development and deployment and will provide advice and recommendations to the vendor on implementation.
  - **CLS Office Administrators** – who will be primarily responsible for direct client communications through the chatbot, and who will provide user feedback on usefulness of the chatbot as designed from MVP to v.3.
  - **Technology Department** – who will oversee the milestones of this project.
  - **Grants Department** – who will report to the grantor regarding milestone competition. Vendor is expected to assist the grants department, if necessary, in providing technical language describing the completion of certain milestones.

**About Our Program**

Community Legal Services (CLS) is a nonprofit legal aid organization serving twelve counties in the Central Florida area. We receive over 100,000 requests for civil legal assistance every year on issues such as family law, consumer protection, housing related matters, and many more.

Ideally, we want the chatbot to help get people to services they need. We have 10 offices and cover multiple areas of civil legal matters, so we’re interested in any proposal which helps website users find what they are looking for with ease and accuracy. We want the chatbot to add value to our site while providing much needed tailored information to the users. Currently, there is no way for users to ask even simple questions and receive a speedy response. We look forward to reviewing your proposal.
Proposal Submission

Please submit proposals no later than 5:00p.m. eastern time, Thursday, January 5, 2023 to Eli Mattern at elim@clsmf.org, subject must include: Chatbot Vendor Proposal.

Proposals should not be longer than 6 pages, and must include the following:

<table>
<thead>
<tr>
<th>Proposal Requirements</th>
<th>Percent of Grading Rubric</th>
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<tbody>
<tr>
<td><strong>Overview of vendor:</strong></td>
<td>5%</td>
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<tr>
<td>Name, point of contact, legal entity, mailing address, EIN.</td>
<td></td>
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<tr>
<td><strong>Approach to project discovery:</strong></td>
<td>15%</td>
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<tr>
<td>CLS has allotted time for project research and discovery in collaboration with the vendor. The proposal should explain what approach the vendor will take to the discovery process.</td>
<td></td>
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<tr>
<td><strong>Samples of similar work or a link to a design portfolio:</strong></td>
<td>20%</td>
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<tr>
<td>Preference is given to vendors with previous chatbot experience and experience building technology for legal aid organizations, but all relevant technical and professional experience will be considered.</td>
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<tr>
<td><strong>Description of any subcontractor(s) the vendor intends to employ:</strong></td>
<td>5%</td>
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<tr>
<td>CLS would like to understand whether the people working on the project are contractors or subcontractors.</td>
<td></td>
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<tr>
<td><strong>Brief explanation of project management methodologies:</strong></td>
<td>15%</td>
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<tr>
<td>This should include project management tools (Trello, Clickup, etc) that the vendor prefers, and intended frequency of communication about project deliverables. There is no one correct answer, we will grade this section on whether the proposed vendor provides sufficient clarity around their working style and methods.</td>
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<tr>
<td><strong>Detailed budget:</strong></td>
<td>10%</td>
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<td>Budget should include a proposed payment plan which encompasses the stated deliverables. The proposed payment plan should tie milestone payments to significant deliverables. Note: CLS understands that timeline and milestone deliverables could shift during contract negotiations and in the discovery phase.</td>
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<tr>
<td><strong>Experience and approach to user-testing:</strong></td>
<td>15%</td>
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<td>CLS will partner with the vendor to conduct user-testing of the system both internally and externally. CLS would like to understand what experience the vendor has with user-testing and proposed approaches to the task.</td>
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<tr>
<td><strong>References:</strong></td>
<td>10%</td>
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<tr>
<td>Vendor should provide 3 professional references, preferrable previous clients with whom CLS may discuss vendor’s proposed employment.</td>
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<tr>
<td><strong>Proposal generally:</strong></td>
<td>5%</td>
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<td>Proposals will also be graded on clarity of vision and overall style.</td>
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