

TIG FINAL EVALUATION REPORT

Grantee name: Legal Aid of Nebraska **TIG grant number:** 10047
Submission date: May 17, 2012 **Approval date:** July 2, 2012
Contact person: Dave Pantos **Phone number:** 402.348.1069 x203
Email address: dpantos@legalaidofnebraska

I. Project Goals and Objectives

There is a growing crisis of unrepresented litigants in civil cases in Nebraska. Recent estimates indicate that in over 50% of civil matters litigated in court, at least one party is unrepresented. This is the result of the growing cost of legal representation, combined with the impact of the recent recession on the wealth of low income and moderate income families. Folks simply can't afford a lawyer for even basic legal assistance. The crisis of lack of representation means a crisis of the Constitution. The question is easily asked: how can we enjoy equal protection of the laws without equal access to justice?

It was in this context that Legal Aid of Nebraska partnered with the Nebraska Supreme Court Pro Se Implementation Committee to increase access to justice in Nebraska through the creation of innovative, effective and efficient automated legal pleadings.

The primary goal of this project was to create guided interviews and court form templates to improve low income Nebraskans' access to the court system. To accomplish this goal, the objective was to take existing "court-authorized" form pleadings and automate them using the HotDocs software. Then, we would apply the Access to Justice Author (A2J Author) interface and guided interviews to ensure that the forms completion process was interactive and easy for the user. Finally, the forms would be stored on the Law Help Interactive (LHI) server and links to the forms would appear on the [Virtual Self Help Center](#) section of the Nebraska [statewide website](#).

While there were no significant changes in the goals during the course of this project, the final group of forms did change. This occurred as a result of stakeholders' input and as a result of lower costs to produce the automated forms. The stakeholders, including member of the Nebraska Supreme Court's Committee on Implementation of Pro Se Assistance and staff from Legal Aid determined which forms would have the greatest impact on pro se litigants. The final group of forms created includes:

- 1) [Divorce Packet with children](#)
- 2) [Divorce Packet without Children](#)
- 3) [Set Asides-Misdemeanor and Felony Packet](#)
- 4) [Protection from Domestic Abuse or Harassment Packet](#)

A complete list of all forms contained in each packet is provided on Attachment 1.

II. Evaluation Data and Methodologies

We expect that this project will have long-term impact on access to the courts in Nebraska. However, given the recent publication of the forms, we can only at this point assess proxies for long-term success. These proxies include the strength of the collaboration between Legal Aid, the Court, and other stakeholders; the actual production, testing, and accuracy of the forms; and, finally, in the short-term, the number of forms accessed and completed.

The approved evaluation plan detailing the process Legal Aid employed to assess the success of its project is attached. (Attachment 2) The plan includes detailed strategies and activities to accomplish the project goals as well as the evaluation data that was collected to measure its success. The methods and data ultimately used to develop the evaluation findings included the identification of the forms and interviews to be developed, testing and editing the forms and interviews, involvement of the court liaison and their feedback, input from end users, local court staff and Legal Aid staff. The accessibility of the forms on Legal Aid's website also provided a means for accessibility statewide. Success was measured not only by the number of forms completed but also usability by the end user through beta testing. Each form was tested by client eligible individuals at our Access to Justice Self-Help Center in Omaha, NE. Twenty client eligible users tested the forms and provided feedback. The usability of the forms was also measured by the different ways the legal information was presented.

The availability of the forms was measured by the number and type of outreach activities and publication of the links to the forms. The number of forms downloaded as well as the number of forms actually filed in Court has been tracked as well. Hits to the Virtual Self Help library were collected. The agencies that used the forms also reflected the success of the forms.

III. Summary of Major Accomplishments, Recommendations and Future Steps

The Access to Justice Automated Forms Project has had a meaningful impact on the justice system in Nebraska. Prior to the implementation of this project, no automated forms were available for non-lawyers in Nebraska. Therefore, pro se litigants could only hand-write forms, "borrow" from unauthorized form providers, or try to get help from other agencies. After the implementation of the Project, there are now full sets of automated forms in major areas of civil litigation impacting low income individuals. This has transformed justice in Nebraska.

A summary of major accomplishments is as follows:

- The development of 6 complete packets of forms; divorce with children, divorce without children, protection order, harassment order, set aside-felony, and set aside-misdemeanor with instructions with each packet
- Introduced the A2J Author to automate court pleadings to Nebraska advocates including the Nebraska Supreme Court's Committee on Implementation of Pro Se Assistance Forms Committee
- From January 1, 2012 to March 31, 2012, 42% of the A2J interviews accessed resulted in documents.
- Over 10 Legal Aid staff, 2 court administrators, one appellate judge, and 3 state advocates trained on the development of the A2J interview
- In six weeks the automated library of automated forms was used 1,461 times
- Interviews were written with a number of different teaching aids including "learn more" boxes, videos, .pdf's, instructions, and links to information necessary to complete the forms
- Strengthened the partnership between Legal Aid of Nebraska and the Nebraska Supreme Court
- Legal Aid staff has learned how to automate forms and created A2J Author interviews for future sustainability of the project
- According to surveys, most users found the forms easy to use and the instructions easy to understand.

IV. In-Depth Analysis of Accomplishments

Overview of the Project Implementation:

From the inception of the project key stakeholders were involved in deciding which forms would be developed. The Nebraska Supreme Court had already developed a group of forms that pro se litigants could use. However, the forms were at best "fill-in" and at worst forms that had to be printed and hand-written. The Court agreed with the need for an upgrade to automated forms, and enthusiastically endorsed a partnership with Legal Aid.

The broad group of stakeholders provided input regarding what was the greatest need for pro se litigants. Core members of this group include Richard JD. Sievers, Judge, Nebraska Court of Appeals and Chair of the Supreme Court's Pro Se Assistance Committee, Debora Brownyard, J.D, Director, Dispute Resolution & Special Court Programs, Janet Bancroft, Nebraska Supreme Court Public Information Officer and Liaison for Court Clerks, Legal Aid staff included Dave Pantos, Executive Director, Annette Farnan, Deputy Director and Mike Kammerer, Technology Coordinator. Farnan was charged with the responsibility of acting as the Project Director. The Core Committee met monthly to discuss the project's progress, ongoing assessment of the forms and what our next steps should be.

Once it was determined what forms would be automated, Farnan proceeded to draft a Request for Proposal, (RFP) attached, (Attachment 3) which would ensure forms were drafted within the budget constraints as well as within timelines. Initially only a RFP for the two divorce packets, with and without children, was let out. This was because we simply had no idea what to expect this group of forms to cost. The RFP was then issued to known developers as well as published on the Legal Aid website. Response to the RFP was very positive with 7 responses. Each response was first vetted by Farnan. Her recommendations were then reviewed by Pantos and Kammerer. Consideration was given to selecting a contractor who had experience with LSC-funded programs and who would commit to finishing the project in grant time period. The Core Committee was provided a briefing on the responses, with a final decision being made to award Vince Morris of Path Designs the contract. Surprisingly the cost for this group of forms was less than expected and the Core Committee proffered a second RFP for the development of the Motion to Set Aside packets and Protection and Harassment Order packets. This RFP was awarded to Marc Lauritsen of Capstone. Contracts were executed for both awards.

Work commenced on all packets simultaneously as soon as contracts were signed. Farnan was directed to supervise the Project and work as the liaison for the Core Committee and the developers. Overall, review of the forms was completed concentrically. As forms were automated they were first reviewed and edited by Legal Aid’s group of managing attorneys and Director of Litigation. The review consisted of editing the interview to be sure the questions asked aligned with the already court approved forms and that the interview questions and legal information was presented in a manner that all users would understand. Once those edits had been made the forms were again reviewed by the managing attorneys.

When Legal Aid staff was satisfied with the forms, the next concentric circle was comprised of members of the Core Committee. They were asked to review and provide input and edits. Again, those comments were incorporated into the interviews following the same process. Next, key advocate stakeholders from other statewide advocacy groups and other court personnel were asked to review and comment, following the same process. Members of this concentric circle were from the Commission on Public Advocacy, Nebraska Domestic Violence Sexual Assault Coalition, Domestic Violence Programs of the Administrative Office of the Courts and Probations, the Supreme Court’s Pro Se Assistance Committee, Dispute Resolution and Special Court Programs, Trial Court



Services of the Administrative Office of the Court and Clerks of District and County Court.



The last, but most important group asked to review the forms was client eligible users. To conduct this testing, we employed our Access 2 Justice Center. When walk-in applicants came to the A2J Center, they were asked if they would like to sit down at a computer and test a form. Testing was done under the oversight of the A2J Attorney. Each form was tested by at least 5 different users. At the completion of the forms, the A2J Attorney briefly interviewed the tester for their opinion on the usability of the forms. She also asked for their suggestions for improvement. Their completed forms were then reviewed by Project Director.

After all of these groups' edits had been amalgamated into the forms, they were posted on the Legal Aid website via "Law Help Interactive" server for use. Although many individuals had tested the forms, we continued to receive comments on edits from users once the forms were posted. As these comments were received further changes were made, until the comments ceased. Once the forms were posted the remaining Legal Aid staff that had not been a part of the development was trained on use and location of the forms.

From the onset the forms were "branded" with the A2J logo to track usage. First, as the A2J forms were filed in Court, the Clerks were asked to track their filing. The Supreme Court's Administrators Office agreed to add a database field to track each initial pleading and final pleading of an automated forms case. Court Clerks were then trained on this additional data entry. The judiciary was provided information about the logo, so that when pro se litigants appear in court with the forms, the Judges would know their source and could then notify Legal Aid of any concerns. This also allows for the court system to assess the effectiveness of the forms from the perspective of court personnel.

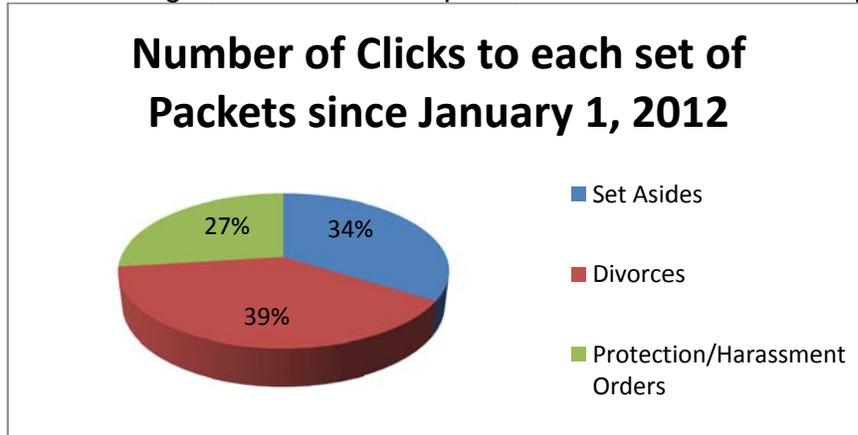
The final, vital step in the project was the promotion of the forms. A news release (Attachment 4) was issued via an email blast to all Nebraska attorneys, funders, and other advocates for the poor. The press release was also published on our website, Facebook, and was tweeted about. An open house with a live demonstration for dignitaries from the Douglas County Courthouse was held at the A2J Center. Outreach demonstrations and trainings were given to Court staff and to a Domestic Violence Community Response team.

Project Impact

In the first few weeks of availability, the forms were accessed nearly 1,500 times. Court personnel, including judges, have reported that the forms are being used and are serving to effectively facilitate the cases of pro se litigants. As a result, we have been

told that the average processing time of a case for a pro se litigant has been reduced by 50%. Less people are being delayed because their pleadings are incomplete or indecipherable. More people are getting access to justice.

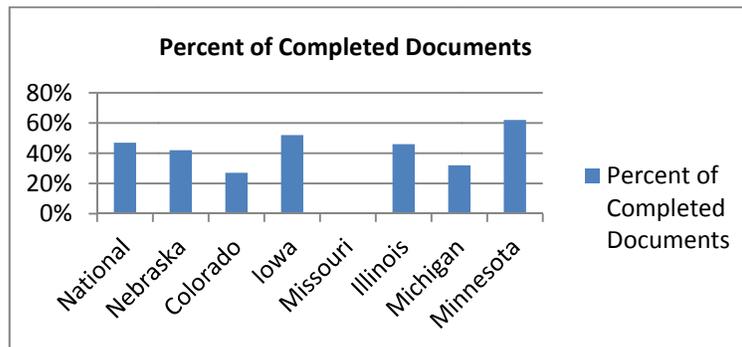
Below is a chart indicating the breakdown of packets/forms accessed this year.



The impact of the project can be measured using other quantitative indicators. The chart below provides the cost of each case if the services had been provided by the private bar.

Legal Packet	Average Case Cost
Uncontested Divorce, no children	\$1000
Uncontested Divorce, children	\$750
Set Aside, Felony	\$300
Set Aside, Misdemeanor	\$300

The success of the Project can also be measured by comparing completed documents to other surrounding states and to the national averages. From January 1, 2012-March 31, 2012 nationally 47% of the A2J interviews accessed resulted in documents. In Nebraska 42% of the A2J interviews resulted in documents.



The cost of development of the packets was reduced thanks to previous A2J forms developed by other LSC TIG grants. We were able to utilize lessons learned from these projects. Additionally, the developers contracted with had extensive experience and expertise in HotDocs, A2J interviews and LHI. For our project we were able to benefit from this.

V. Factors affecting project accomplishments

The most significant challenges in this project included

- staff time
- coordination of many collaborators
- interfacing with two developers
- the amount of time needed to develop the interviews even though court approved forms were being used

Staff Time: The project employed the resources of not only the Project Director, but also the time and talents of many of the Legal Aid managers, including the Director of Litigation. Without their expertise and knowledge of the varying local court practices the forms would have not have been successful statewide.¹

Coordination of Many Stakeholders: The realization of the forms would not have been achieved without the countless hours of editing and review by all the collaborators. The difficult issue with so many, but needed, reviewers is finding a way to incorporate their comments and edits in a coordinated manner. This process was daunting but necessary. Involving stakeholders in this new process in Nebraska was needed for them to “buy in” to the idea of automated forms.

Interfacing with Two Developers: Because the estimated costs for the initial set of forms was less than expected we had the pleasant task of contracting for more forms. We went with 2 different providers because we were concerned that one would not be able to develop the number of forms within the time constraints. Each developer approached the process differently. This required flexibility by the Project Director and reviewers.

Amount of Time: The time to develop interviews exceeded expectations. Because we were starting with court approved forms, we believed the process would be simpler than if we had had to draft the forms. While having the forms in place at the start of the project did remove one step, drafting interviews presenting complex legal information in a format that would be understandable to all was formidable.

VI. Strategies to address major challenges

The coordination of all the stakeholders was overwhelming. All provided valuable comments and edits. It was necessary to facilitate good communication between all of the concentric groups. Furthermore, members of these groups were located across the state. To accomplish this coordinated communication Legal Aid used several different types of web based resources including Basecamp and monthly conference “go to meeting” calls.

Additionally the project director was appointed as the point person to filter all comments and edits within the groups of stakeholders and then to the developers.

VI. Major lessons and recommendations

Major Lessons:

Ability of in-house staff to convert forms to HotDocs, with the A2J Interview software:

In-house staff trained on the process is cost effective for many reasons. Once forms are developed as changes are needed, contracting with a developer is not cost effective. Furthermore, the ability to make changes immediately is priceless.

Ability of in-house staff to access the LawHelp Interactive Server:

Not only does staff need to have the skill set necessary for HotDocs and the A2J Interview software, they need to understand how to access the LawHelp Server, to make changes and to obtain information about the number of forms downloaded, to track usage.

Create shorter interviews

In Legal Aid’s zealous attempt to create complete pleading packets, our interviews became quite long. We remedied this issue after publishing by asking the developer to add “save” screens within the interviews.

Recommendations:

Overall, the use of A2J automate forms is a proactive manner in which to serve the increasing number of pro se litigants. Because the audience accessing these forms are diverse, it is necessary to be creative when developing the interviews and employ as many teaching strategies as needed to present the complex information. One way to accomplish this is by creating YouTube or other videos and embedded in interviews.

If automated forms are new to a service area, enlist the help of as many stakeholders as possible to ensure buy in. Initially, there was skepticism by some of the broader

stakeholders. There was a concern that the interviews would not produce quality pleadings, they would be too complicated for the end users or that the automated forms would drive small practitioners out of business. None of this has come to fruition. The courts report quality pleadings and the forms are being used by pro se litigants. Private practitioners have communicated their excitement about this resource, reporting it is a relief to have a meaningful tool to help clients that can not afford to pay an attorney.

Attachment 1
List of Developed Forms

- 1) Divorce Packet with children, including
 - a) Notice of Hearing
 - b) Affidavit and Application to Proceed In Forma Pauperis,
 - c) Order to Proceed In Forma Pauperis,
 - d) Petition for Dissolution of Marriage
 - e) Motion for Service by Publication
 - f) Affidavit in Support of Motion for Service by Publication
 - g) Order for Service by Publication
 - h) Decree of Dissolution of Marriage
 - i) Instructions for your Divorce Hearing
 - j) Confidential Party and Social Security, Gender, Birth Date(s)
 - k) Bureau of Vital Statistics Worksheet
 - l) Certificate of Completion of Parenting Education Course
 - m) Financial Affidavit for Child Support
 - n) Parenting Plan, Parent-Created
 - o) Parenting Plan, Absent Parent, Court Use
 - p) Parenting Plan, Absent Parent, Plaintiff's Use

- 2) Divorce Packet without children
 - a) Notice of Hearing
 - b) Affidavit and Application to Proceed In Forma Pauperis,
 - c) Order to Proceed In Forma Pauperis,
 - d) Petition for Dissolution of Marriage,
 - e) Motion for Service by Publication
 - f) Affidavit in Support of Motion for Service by Publication
 - g) Order for Service by Publication
 - h) Decree of Dissolution of Marriage
 - i) Instructions for your Divorce Hearing
 - j) Confidential Party and Social Security, Gender, Birth Date(s)
 - k) Bureau of Vital Statistics Worksheet

- 3) Criminal Set Aside for felonies
 - a) Motion to Set Aside
 - b) Order to Set Aside
 - c) Notice of Hearing
 - d) Instructions, including final hearing script

- 4) Criminal Set Aside for misdemeanor
 - a) Motion to Set Aside

- b) Order to Set Aside
 - c) Notice of Hearing
 - d) Instructions, including final hearing script
- 5) Protection Order including
- a) Praecipe
 - b) Social Security information Form
 - c) Petition and Order
 - d) Instructions: How to File a Domestic Abuse Protection Order FAQ
- 6) Harassment Order
- a) Praecipe
 - b) Social Security information Form
 - c) Petition and Order
 - d) Instructions: How to File a Harassment Protection Order FAQ

Attachment 2 Evaluation Plan



Legal Services Corporation Technology Initiative Grant (TIG) Program APPROVED Evaluation Plan Form

Grantee name: Legal Aid of Nebraska
Submission date: July 7, 2011 (revised)

TIG Grant number: 10047
Approval data:

Contact person: Dave Pantos
Email address: dpantos@legalaidofnebraska.com

Phone number: 402 - 348 - 1069 x203

Project Goal: Use A2J author and HotDocs to create guided interviews and court form templates to improve low income Nebraskans' access to the court systems.

Project Objective:

Use A2J Author and HotDocs to create guided interviews and court form templates that enable pro se litigants to easily produce accurate pro se pleadings and thereby increase and enhance their access to the court systems. Produce at least 9 guided interviews and 9 interactive court forms in the following substantive law areas: Divorce with (and without) children), In Forma Pauperis (Waiver of Court and Service Fees), Parenting Plan, Notice of Hearing, Protection Orders and Support Modifications.

Strategies / Activities:

- Select contractor who has experience with LSC-funded programs and who can commit to finishing project in grant time period
- Identify court-approved forms and interviews to automate
- Identify supervisory staff and allocate time to review approval of forms sent to and received from contractor
- Work with Nebraska Courts-identified liaison to ensure that forms are accurate and approved
- Test forms on clients/client-population to ensure usability
- Based on testing and accuracy reviews, modify forms and interviews as necessary
- Post forms and interviews on "Law Help Interactive" site
- Post links to LHI forms and interviews on statewide website and Court website.
- Establish and implement evaluation process within Court system to assess the effectiveness of the forms from the perspective of court personnel

Evaluation Data:

- List and description of and links to interviews and forms
- Test protocols, test results, significant changes based on results.
- Identification of qualified contractor
- List of forms and interviewed identified and approved by Legal Aid of Nebraska and Courts

- Identification of Court liaison and meetings with same
- Modification of forms within grant time period
- Number and accessibility of links to published forms on statewide website
- Survey data from court personnel regarding effectiveness of forms

Project Objective:

Improve and increase availability of and use of forms and interviews among low-income pro se Nebraska population

Strategies / Activities:

- Establish and implement outreach initiative with courts and networks with partners and allied agencies (United Way, YWCA, Libraries, Heartland Family Services, etc.)
 - Train Legal Aid intake, support, and advocacy staff on use and location of forms
 - Create YouTube or other video training for court personnel and other agencies to explain and illustrate use of forms
 - Create and approve "A2J Self Help" logo for branding of forms for tracking of usage
 - Coordinate tracking with Supreme Court Administrator's office
 - Establish and staff tracking "promotions operation" at Legal Aid to post usage (e.g., tweet indicating "1000th form used.")
 - Inform public through website and other appropriate media
-

Evaluation Data:

- Description of Outreach Activities
- List and description of published of and links to outreach materials
- Number forms submitted per month and year per court personnel
- Interviews started and completed from LHI Server.
- User survey data re: usefulness and usability of interviews and forms.
- List and descriptions of and links to YouTube and other training materials
- Number of clients or callers effectively referred by Legal Aid staff to automated forms/interviews
- Number of agencies who refer clients to forms/website per survey of agencies

Attachment 3
Request for Proposal

LEGAL AID OF NEBRASKA
REQUEST FOR PROPOSALS
RFP

Document Assembly Software

Legal Aid of Nebraska (LEGAL AID) is initiating this Request for Proposals (RFP) to solicit responses from vendors interested in converting legal self help forms into interactive A2J forms to be stored on LawHelp Interactive server.

1. PURPOSE AND DESCRIPTION:

1.1. Purpose:

LAN is initiating this Request for Proposals (RFP) to solicit responses from vendors interested in converting legal self help forms and placing the forms and interviews on the LawHelp Interactive National HotDocs Server (Server) and then publishing them in an automated format on the Server with an Access to Justice Author (A2J Author) as the interface for to be used by Nebraska residents. These forms will allow low income citizens, in an interview format, to complete forms for presentation to their local Courts. LEGAL AID's goal is to provide an easy to use system of assembling proper court acceptable forms presently found here:

<http://supremecourt.ne.gov/self-help>

The successful vendor will assist LEGAL AID with creating and coding of the documents as outlined on Exhibit B. Links to each document are provided on Exhibit B.

1.2. Goal:

Our plan is to create a virtual self help center where citizens can obtain the required self help information, tutorials, tools and forms necessary to complete automated forms that will be acceptable for use by their local Courts. As such, the goal of this RFP will be to create documents that interface with the A2J author interview for the self help forms that give citizens the ability to complete, print and file the proper forms.

1.3. PRODUCT and Services Required:

The PRODUCT is to meet all of the mandatory requirements listed in Exhibit A and B.

1.4 Timeline for Completion: The PRODUCT is to be completed by December 31, 2011.

1.5 Payment: Payment will be made in two installments contingent upon completion of forms. The first installment payment will be made on or before September 30, 2011 upon satisfactory completion of the first tier of documents including

placement of the forms on the Server with A2J interface as described on Exhibit B. The second and final payment will be made upon the satisfactory completion of the 2nd tier of documents including placement of the forms on the Server with A2J interface as described in Exhibit B.

2. RFP ADMINISTRATION AND INSTRUCTIONS TO VENDORS:

2.1. **RFP Coordinator:** Upon release of this RFP, all vendor communications concerning this acquisition must be directed to the RFP Coordinator listed below. Any oral communications will be considered unofficial and non-binding on LEGAL AID. Only written statements issued by the RFP Coordinator may be relied upon.

Annette Farnan, Deputy Director
Legal Aid of Nebraska
1904 Farnam, Suite 500
Omaha, NE 68102
E-mail: afarnan@legalaidofnebraska.com
Telephone: (402) 348-1069 x224

2.2. RFP Schedule:

RFP released May 16, 2011
Responses due not later than 12 noon CST June 20, 2011
Evaluation Period June 30, 2011
Successful vendor announced June 30, 2011
Contract signed and work commences July 5, 2011

2.3. **Vendor Questions:** Vendors may contact the RFP Coordinator at the address and/or numbers listed in Subsection 2.1 above with any questions concerning this RFP. All questions must be received prior to the response due date and time listed in Subsection 2.2 above. Written questions are preferred and should be submitted by e-mail to ensure receipt and timely response.

2.4. **Response Format:** The proposal must be sent electronically via e-mail in Microsoft Word 97 or newer version, RTF, or Adobe PDF format to the RFP Coordinator designated in Section 2.1 of this RFP. The e-mail subject should be clearly marked "Document Assembly TIG".

The proposal must be received no later than 12:00 p.m., CST on the date specified in section 2.2 of this RFP.

Vendors should allow enough electronic delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Vendors assume the risk for any e-mail delay problems.

Proposals that exceed 20 pages in length will not be accepted. Late proposals will not be accepted and will be automatically disqualified from further consideration.

2.5. **Response Requirements and Content:** Vendors must respond to each question/requirement contained in Exhibit A, Vendor Response. In preparing their response, vendors should restate each requirement and then give their response.

2.6. Response Date and Location:

2.6.1. The vendor's response, in its entirety, must be received by the RFP Coordinator in Omaha, NE, in accordance with the schedule contained in Subsection 2.2 above. Late responses will not be accepted and will be automatically disqualified from further consideration.

2.6.2. Vendors assume the risk of the method of dispatch chosen. LEGAL AID assumes no responsibility for delays caused by the U.S. Postal Service, or any other party or communication device. Postmarking by the due date will not substitute for actual response receipt. Late responses will not be accepted, nor will additional time be granted to any vendor. Responses may be delivered by mail, courier, hand-delivery, facsimile transmission or email.

2.7. Costs of Preparing Responses: LEGAL AID will not pay any vendor costs associated with preparing responses, submitted in response to this RFP.

2.8. Responses Property of LEGAL AID: All responses, accompanying documentation and other materials submitted in response to this RFP shall become the property of LEGAL AID and will not be returned.

2.9. Proprietary Information/Public Disclosure: All responses received shall remain confidential until the evaluation is completed and the vendor is selected and approved. Thereafter responses shall be deemed public records.

2.10. RFP Amendments/Cancellation/Reissue/Reopen: LEGAL AID reserves the right to change the RFP Schedule or issue amendments to this RFP at any time. LEGAL AID also reserves the right to cancel or reissue the RFP. All such actions will be posted on LEGAL AID's website.

2.11. Minor Administrative Irregularities: LEGAL AID reserves the right to waive minor administrative irregularities contained in any response.

2.12. Inability to Enter Contract: LEGAL AID reserves the right to eliminate from further consideration any vendor that LEGAL AID, because of legal or other considerations, is unable to contract with at the time responses are due in accordance with the schedule contained in Subsection 2.2 above.

2.13. No Obligation to Enter a Contract:

2.13.1. The release of this RFP does not compel LEGAL AID to enter any contract.

2.13.2. LEGAL AID reserves the right to refrain from contracting with any vendor that has responded to this RFP whether or not the vendor's response has been evaluated and whether or not the vendor has been determined to be qualified. Exercise of this reserved right does not affect LEGAL AID's right to contract with any other vendor.

2.13.3. LEGAL AID reserves the right to request an interview with any vendor and/or a demonstration from any vendor prior to entering a contract with that vendor.

If a vendor declines the request for an interview or demonstration for any reason, the vendor may be eliminated from further consideration.

2.14. **Multiple Contracts:** LEGAL AID reserves the right to enter contracts with more than one vendor as a result of this RFP.

2.15. **Non-Endorsement:** The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to LEGAL AID in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of LEGAL AID.

2.16. **Contract Payment Limitations:** Vendors should anticipate payment at the end rather than the beginning of the invoice period in which they provide services or after they submit any deliverable for which a payment is due.

3. RFP EVALUATION:

3.1. LEGAL AID Evaluation Team (Team) of at least two (2) persons will evaluate the responses to this RFP. The Team may also consider past contract performance and check references beyond those listed in the vendor's response.

3.2. As part of the evaluation process, at the discretion of the Team, vendors may be asked to clarify specific points in their response. However, under no circumstances will the vendor be allowed to make changes to the response.

4. POST EVALUATION

4.1. **Notification of Selection of Apparently Successful Vendor:** Vendors whose responses have not been selected for further negotiations or award will be notified via e-mail.

4.2. **Contract Award/General Terms and Conditions:**

Vendors selected to provide application services will be expected to enter into a contract with LEGAL AID.

LEGAL AID OF NEBRASKA
REQUEST FOR PROPOSALS
RFP

Document Assembly Software

EXHIBIT A - VENDOR RESPONSE

Responses must contain the following information in the following format. Please number your responses to correspond with the information requested here.

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 LEGAL AID 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 LEGAL AID employee or resides with an LEGAL AID 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. All programming will involve using forms and interviews as drafted by LEGAL AID staff and the Nebraska Supreme Court Implementation Committee on Pro Se Litigation and placing the forms and interviews on the LawHelp Interactive National HotDocs Server (Server) and then publishing them in an automated format on the Server with an Access to Justice Author (A2J Author) for interface for use by Nebraska residents.
7. Provide two (2) references for programs for other automated documents you have completed. Please include a phone number or e-mail address of the referenced individual so he/she may be contacted.
8. Describe in detail the timeline to convert each form listed in Exhibit B. Propose the cost to develop each form and interview on the LawHelp Interactive National HotDocs Server (Server) and then publish them in an automated format on the Server with an Access to Justice Author (A2J Author) for interface for use by Nebraska residents. Instructions for each form, directed to the audience of pro se litigants can be found <http://supremecourt.ne.gov/self-help>. Each form should also include instructions that are printed at the conclusion of the form and printed with the form. **Please note**, Nebraska forms for Dissolution without children, Dissolution with children, Praecepte for Summons/Personal Service and Voluntary Appearance have already been converted into a HotDoc format with the A2J Author component and are on the LawHelp Interactive National HotDocs Server. It will be necessary that all forms developed in this RFP successfully interface with these existing document.

9. These documents must be completed no later than December 31, 2011.
10. All forms must contain the Legal Aid of Nebraska Access to Justice logo, which will be provided by Legal Aid.

Exhibit B
Documents

Instructions for each form listed below can be found
<http://supremecourt.ne.gov/self-help>

TIER ONE FORMS:

- Notice of Hearing, <http://www.supremecourt.ne.gov/forms/district/DC-6-4-5.pdf>
- Affidavit and Application to Proceed In Forma Pauperis,
<http://www.supremecourt.ne.gov/forms/district/DC-6-7-1.pdf>
- Order to Proceed In Forma Pauperis,
<http://www.supremecourt.ne.gov/forms/district/DC-6-7-2.pdf>
- Decree of Dissolution of Marriage, with Children, [Decree of Dissolution of Marriage – With Children, DC 6:5\(3\)](#)
- Motion for Service by Publication,
<http://www.supremecourt.ne.gov/forms/district/DC-6-6-1.pdf>
- Affidavit in Support of Motion for Service by Publication
<http://www.supremecourt.ne.gov/forms/district/DC-6-6-2.pdf>
- Order for Service by Publication
<http://www.supremecourt.ne.gov/forms/district/DC-6-6-3.pdf>
- Decree of Dissolution of Marriage, no children:
<http://www.supremecourt.ne.gov/forms/district/DC-6-4-6.pdf>
- Instructions for your Divorce Hearing,
<http://www.supremecourt.ne.gov/forms/district/DC-6-5.pdf>

TIER TWO FORMS:

- Confidential Party and Social Security, Gender, Birth Date(s)
<http://www.supremecourt.ne.gov/forms/conf-party-ssn-info-index.shtml>
- Bureau of Vital Statistics Worksheet <http://www.hhss.ne.gov/ced/HHS-73WorkSheet.pdf>
- Certificate of Completion of Parenting Education Course
<http://www.supremecourt.ne.gov/forms/district/DC-6-5-5.pdf>

- Financial Affidavit for Child Support
<http://www.supremecourt.ne.gov/forms/district/DC-6-5-2.pdf>
- Parenting Plan, Parent-Created
<http://www.supremecourt.ne.gov/forms/district/DC-6-5-6.pdf>
- Parenting Plan, Absent Parent, Court Use,
<http://www.supremecourt.ne.gov/forms/district/DC-6-5-13.pdf>
- Parenting Plan, Absent Parent, Plaintiff's Use
<http://www.supremecourt.ne.gov/forms/district/DC-6-5-14.pdf>

**Attachment 4
Press Release**

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FOR IMMEDIATE RELEASE – March 2, 2012

Access to justice in Nebraska has become more of a reality for low income Nebraskans, with the publication of automated court pleadings on Legal Aid of Nebraska’s website.

Dave Pantos, Executive Director of Legal Aid explained “We wanted to give people the tools they need to represent themselves in basic civil legal matters where they cannot afford to hire an attorney. While having an attorney is the best option, that option is not available for thousands of Nebraskans.”

Legal Aid of Nebraska has partnered with the Nebraska Supreme Court’s Committee on Implementation of Pro Se Assistance Forms to create a “Virtual Self Help Center” on Legal Aid’s website. The forms include a divorce packet for families with both kids and no kids, and all of the required documents and instructions needed to take a divorce from start to finish.

“The whole process is much like online tax preparation programs,” said Pantos. “It asks you the questions, and when you are done you get to print out professional court pleadings. And you also get instructions on where to file them and what to do next.”

While there are many costly online services that produce legal pleadings, the Legal Aid/Supreme Court project pleadings are free for low-income Nebraskans. “And,” said Pantos, “our forms are designed by a committee of legal experts including judges, law professors and practicing attorneys.”

Funding for the development of these forms comes from a grant from the Legal Services Corporation-Technology Initiative Grant Program and the Nebraska Supreme Court.

In addition to the divorce packets, the Virtual Self Help Center includes Motions to Set Aside a Conviction, Motion for a Protection or Harassment Order, and Durable Power of Attorney.

For almost fifty years Legal Aid has been committed to providing justice, dignity, hope and self-sufficiency through quality civil legal aid for those who have nowhere else to turn. "We are always looking for ways to make our services more accessible to those in need," said Pantos.

The Center can be found at <http://www.legalaidofnebraska.com/VirtualSHCL>.