Alaska Legal Services Corporation

Request for Proposals issued 12/17/2020
Digital Assistant to Support Social Security Disability Applicants

The objective of this Request for Proposal ("RFP") is to engage a qualified vendor who can complete the design, project management, and development of a digital assistant that makes it easier for community navigators (case managers, social workers, community health aide, and other social service providers) to plan, organize, and prepare their clients to complete an application for Social Security Disability Insurance or Supplemental Security Income benefits. The vendor will be engaged to create two versions of the digital assistant, a minimum viable product (MVP), and an expanded "Version 2".

Alaska Legal Services Corp. (ALSC) is soliciting written proposals that identify capabilities, capacity, deliverables, and pricing for this development project. This project is supported by a Technology Innovation Grant from the Legal Services Corporation.

1.0 Project Background and Goals

Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) are federal programs that help aged, blind, and disabled people who cannot work. Together, the programs provide essential financial assistance for 10.5 million disabled Americans and their families. Applicants in need of these critical programs must overcome a fundamental barrier—the application process is difficult and confusing, but applicants must navigate that process despite the underlying mental and physical disabilities that prevent them from working in the first place. In Alaska, applicants face the additional barriers of the isolation caused by Alaska's sheer size and unreliable internet and phone connectivity.

The goal of this project is to bypass those barriers, and greatly increase the availability of knowledgeable assistance for disability applicants in Alaska, by developing a digital assistant to educate and guide applicants through the process.

We are initially focusing on expanding the capacity of "community navigators," such as clinical case managers or community health aides, who are already helping their patients with these applications. Focusing on community navigators greatly simplifies the accessibility and connectivity challenges of developing a tool for the applicants themselves. Furthermore, many disability applicants experience severe mental impairments and a community navigator may be best able to effectively communicate with them. Thus, empowering community navigators is also a way to provide assistance to a population of disability applicants in dire need of help.

Case managers we've interviewed have said that they know how important obtaining these benefits are to their patient's wellbeing, but they don't have access to clear instructions for what information needs to be gathered, what a complete application should include, or a way to keep

track of where their many clients are in the application process. We will fill that gap with a digital assistant designed with their needs in mind.

We anticipate that this digital assistant will be of greatest benefit to rural Alaskans who were unable to get meaningful application help directly from the understaffed Social Security Field Offices in Alaska (even before the COVID-19 emergency). Accordingly, it is critical that the digital assistant works reliably despite connectivity interruptions and meets the necessary regulatory expectations to be used by medical providers.

1.1 Project History

In June of 2020, ALSC completed a 5-day human centered design sprint to identify how technology could better support community navigators during the disability application process. The sprint was led by Pro Bono Net's Legal Empowerment and Technology Initiative, which also provided extensive product strategy and user experience design support for the conceptual phase of the project.

The sprint team used a co-design approach that blended participatory research methods and a legal empowerment strategy to produce a high-fidelity prototype of the tool. The prototype was then subjected to user testing by volunteer case managers from clinics that are members of the Alaska Native Tribal Health Consortium. The testers provided many valuable insights, the most basic of which was that each said they would be very happy to use a product like the prototype. More than one asked if they could start using it immediately.

Having completed product visioning, target user analysis, and additional user research, ALSC is now interested in building and launching a minimally viable version of the product (MVP).

1.2 Community-centered Design Approach

A critical component of this project is the use of a community-centered design approach to building technologies. Feedback, insights, and co-design inputs from the community were incorporated throughout the ideation phase of this project. Project managers should be prepared to continue to seek out perspectives from the community who can speak to the experience of applying for disability benefits (either as an advocate or an applicant) during all phases of this project. Regular user testing and feedback from community partners is essential to creating a product that improves the lives of disability applicants in Alaska. A network of community navigators has already expressed an interest in providing additional feedback or testing.

Proposals demonstrating experience in applying equity design or participatory action research to their projects are especially welcome.

2.0 Description of Work

This RFP seeks a vendor who can be a development partner for an initial MVP version of the digital assistant, based on the initial design work that has been completed, and then an iterative "Version 2" of the digital assistant that builds on user feedback from the MVP version.

- The vendor will provide project management, design (including UX and technical), and development services.
- ALSC and partner organizations will provide the required subject matter expertise and community engagement.

Target completion dates are:

1. MVP version-   May of 2021
2. User testing and feedback-   June of 2021
3. Version 2-   August of 2021

2.1 Critical components of the project.

Our design process has identified the following critical components of an initial MVP version:

- The digital assistant will use local-first development principles to be accessible even when the user is offline.

- It must meet the baseline regulatory expectations for users in a medical setting.

- The digital assistant should provide the user with a way to manage the progress of the different applicants they are assisting.

- Within the digital assistant, a dynamic checklist function should help users identify and customize the steps that that they need to take to complete an applicant's initial application.

- The dynamic checklist function should facilitate user organization by helping users keep track of client information as it is associated with certain Social Security forms.

- Users should be able to access legal education about the disability application process from within the digital assistant, via a help center and tool tips, so they can learn how and why certain forms or information may be necessary for a particular applicant. Subject matter experts from ALSC and partners will prepare that educational content.

- Where possible, the digital assistant should automate or make more easily accessible repetitive information so community navigator users can focus more on their clients.

- As non-legal advocates working to help applicants know and use the law, users should be empowered by the content and structure of the tool to make the best strategic decisions for their clients.

2.2 Deliverables.

1. Project management- The vendor will dedicate a person or persons to define the design and development tasks required for the project and to ensure that those tasks are completed in a timely manner. That person will engage with designated ALSC staff, such as the technology attorney, to co-ordinate on design and development tasks. They will

guide ALSC staff in the identification and evaluation of design choices or technical trade-offs throughout the process of design, development, and refinement.

2. Design- Consistent with the community-centered design approach of the project, the vendor will build on the pre-existing design work. The vendor will have the capacity to incorporate that work into a project design that meets the project objectives, incorporates the agreed critical project components into a MVP, manages user data consistent with regulatory obligations and responsible data practices, and provides a solid foundation for future iteration. A second round of design work may be required for Version 2 of the project.

3. Development- The vendor shall have the capacity to complete technical design and development work consistent with industry best practice and any applicable regulatory standards. Development includes deployment of the project. The vendor will have the development capacity to perform that work in a timely manner. Development work will accommodate the possibility of future iterations of the project that may be developed by the same or different vendors. The vendor shall make any necessary corrections to the product to ensure it performs as designed.

4. <u>The vendor is NOT responsible for:</u>
   a. Outreach to, or communication with, community design partners,
   b. Conducting user testing of the project
   c. Providing any legal or subject matter expertise required for project design or development, including
   d. preparing the legal education content,
   e. technical maintenance of the project after Version 2 is complete,

2.3 Desired Qualifications for vendors.

A strong development partner for this project would have:

- A demonstrated history of working with mission or equity-focused partners in their work.
- Strong communication skills to ensure ideas are clearly presented and discussed
- A demonstrated history of working closely with partners to identify and evaluate technical trade-offs and design choices using an agile approach
- Strong management and communication skills to ensure design expectations are met and consistent progress is made.
- Demonstrated fluency in setting up coherent and thoughtful information architectures within products.
- Developed prior products which demonstrate that the vendor has experience thinking through the user experience of the product at both a granular and a systems level, to best serve the needs of the user.
- Experience building with local-first development practices, ideally for remote communities

2.4 Payment

The amount and structure of payment will be established by contract between the chosen vendor and ALSC. ALSC has received a TIG grant (#19016) for this project. Vendors responding to this RFP are required to include a project budget (see section 3.0). Those responses will be competitively evaluated on cost and other factors. Proposed project budgets will not exceed $80,000.00.

3.0 Response and Response Format

3.0.1 RFP Schedule

RFP released:	12/17/2020
Responses due no later than 12 noon, Alaska time on:	1/25/2021
Evaluation period begins:	1/27/2021
Successful vendor announced:	2/03/2021
Contract signed and work commences:	2/17/2021

3.0.2 Vendor responses must not exceed 20 pages in length. The proposal must be sent electronically via email to evang@alsc-law.org in either as Microsoft Word (.docx) or Adobe PDF files. The email subject should be clearly marked "Request for Proposal – Digital Assistant to Support SSD Applicants."

Responses are due by: 1/25/2021

3.0.3 Responses must include the following:

- Business Name, Address, Federal Tax Identification Number, and a description of legal status, e.g., corporation, sole proprietor, etc.
- Contact name, telephone number, and email.
- A statement guaranteeing the response constitutes a firm offer valid for sixty days following receipt and that ALSC may accept any time within the 60 day period.
- A project plan which identifies how the MVP version will incorporate the critical components to meet the project objectives and demonstrates the vendors design and project management expertise.
- A statement identifying the development tools that will be used, and the platform for the digital assistant.
- A development budget and project timeline that demonstrates the vendor's project management expertise.
- An estimated cost to complete both phases of the project.
- An anticipated annual maintenance budget for the digital assistant, when live.
- Two references for other projects you have developed. Please include a phone number or email address of the referenced individual so they may be contacted.

3.0.4 Vendors providing submission will be notified by email when a submission was received, when they are no longer considered for selection, and if they have been selected. At

ALSC's full discretion, late responses, or responses that do not follow these guidelines, will not be considered.

3.0.5 All submissions become the property of ALSC and shall be kept in confidence until the vendor selection process is complete.

3.0.6 If, in preparing a proposal, you have additional questions, please contact Eric Vang by email at evang@alsc-law.org

3.1 Requests for Additional Documentation

3.1.1 ALSC and its project partners, prior to selecting a vendor, reserve the right to interview or request additional documentation from potential contractors including, but not limited to:

- Professional References
- Additional business information
- More detailed information about a technical or budget proposal

3.1.2 A vendor who declines a request for additional documentation or an interview may be removed from consideration at the discretion of ALSC.

3.2 Evaluation Criteria for Received Vendor Proposals

Submissions will be evaluated on the following criteria:

1. Feasibility and sustainability of the proposal.
2. An assessment of whether the qualifications and experience of the proposing party are sufficient to complete the proposed project on time and on budget.
3. Cost.
4. The desired qualifications of vendors identified in section 2.3 above.

3.3 RFP Amendments/Cancellation/Reissue/Reopen

ALSC reserves the right to change the RFP Schedule or issue amendments to this RFP at any time. ALSC also reserves the right to cancel or reissue the RFP. All such actions will be noted on ALSC's website, alsc-law.org.

3.4 No Obligation to Enter a Contract

ALSC has no obligation to enter into a contract for services with the selected vendor or any vendor. ALSC may select more than one vendor or no vendor. No payment will be made for work which is not properly authorized and contracted for.

Eric Vang
Eric Vang
Senior Technology Attorney, ALSC
evang@alsc-law.org
(907)586-5969

Attachment: Design Sprint Prototype, two page excerpt.

Sam Langmore
Alaska Native Health Group

+ Add Applicant

HELP

Dashboard/Applicant List

Search ▼ ►

Applicant Number ˅	Applicant Name ˅	Status ˅	Date of Birth ˅	Staff Lead ˅	Last Login ˅
#123456	Pat Miller	In-progress	05/04/1972	Sam Langmore	05/31/2020
#123457	Calvin Steward	Complete	01/09/1969	Sam Langmore	05/20/2020
#123458	Ralph Richards	In-progress	03/10/1974	Sam Langmore	05/01/2020
#123459	Bernard Murphy	In-progress	12/03/1979	Sam Langmore	05/21/2020
#123460	Arlene Robertson	Complete	11/10/1970	Sam Langmore	04/27/2020
#123461	Jane Lane	Complete	08/12/1975	Sam Langmore	05/15/2020

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Dashboard

Calendar

Alerts

Reports

Sam Langmore
Alaska Native Health Group

Checklist

| Application | Checklist | Documents |

Pat Miller ✏ (click to edit) Applicant # 123456

Last Login: 05/31/2020   🕐 In-Progress File

Basic Requirements ❓

Prepare for application

Required documents

Birth Certificate

W-2 or self employment tax return

Create MySocialSecurity account

Information organizing

Complete work history worksheet

Complete disabling conditions worksheet

Complete medical history

Create list of current medications

Gather any important medical records
you already have

After application is submitted

Sign and submit SSA-827 Medical release form

Schedule interview with SSA

Gather new or additional medical records for DDS

Give advocate contact information for DDS
caseworker

New additional items

Start, or restart, mental health services with a
regular provider

Get a specific medical test

Additional items ❓

▣ Start, or re-start, mental health
services with a regular provider ❓

➕ Physical Residual Functional
Capacity form ❓

➕ Mental Residual Functional
Capacity form ❓

➕ Third party statement of
disability ❓

▣ Get a specific medical test ❓

➕ Get a neuropsychological
evaluation ❓

➕ Gather grade school medical
records ❓

💾 Save

HELP ❓

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