# Lakeshore Legal Aid Project

## Executive Summary

Rocket Technology is being presented with an exciting opportunity to assist our partners, The Gilbert Family Foundation, Rocket Community Fund, and Lakeshore Legal Aid, in their mission to assist Detroiters with housing difficulties, while at the same time building out a new app that leveraged generative AI in the same ways we’d like to deploy to our own clients. This is a great opportunity to expand our experience with AI while making a huge impact in our community.

## Background

Lakeshore Legal Aid (LLA) is a not-for-profit law firm providing a range of free civil legal services to people who are low income, older adults, and survivors of domestic violence and sexual assault in our communities. Their mission is to fight poverty and injustice through advocacy and by providing meaningful and dignified access to the legal system. To help them in this mission, the Gilbert Family Foundation and Rocket Community Fund often partner with LLA to ensure they can continue to provide critical legal services to Detroiters.

One of these services is to provide legal assistance to low-income individuals facing imminent eviction. When a person is facing eviction, they are served notice by a Wayne County Court that their landlord or Mortgage Servicer has started proceedings. If they show up at court (and many don’t, out of fear and lack of understanding of resources available to them), they will be made aware that if they desire the opportunity for free legal counsel and perhaps representation, they can visit with LLA in a separate office before their hearing.

If the person decides to meet with LLA, a representative will speak to them and guide them through an intake form which determines whether they are eligible for free legal representation. This [intake form](file:///Users/dvasquez/Library/CloudStorage/OneDrive-Knex/Documents/1.%20Projects/Lakeshore%20Landlord%20Tenant%20Information.xlsx) documents:

* Basic information about the client
* Information about the facts of their case
* Information about the property they are being evicted from
* Their personal financial situation (including collection of backing documentation like paystubs or proof of benefits).
* Their goals for remedying the current situation

In some cases (chiefly income related) the data presented may disqualify the client from further legal services. Other scenarios can be discovered in this phase which require LLA to pass the client on to another legal firm in order to avoid conflict of interest concerns, or to facilitate scheduling of legal professionals assigned to the case.

If the client is eligible for services, their information will then be sent either to LLA’s case management system (Salesforce based) or to another agency’s case management system (also Salesforce) so that a lawyer can be assigned and scheduled to meet with the client.

## Opportunity

Many potential clients miss the opportunity to ever learn about LLA’s services by not showing up to court, which is currently the primary venue by which they would come to learn about the free support available to them.

LLA is also looking for help scaling the intake and sorting process.

If clients could self-service the intake process, ideally before even attending court, there is an opportunity for a significantly smoother and more scalable experience in which lawyers are pre-assigned to meet prepared clients at court rather than playing catch-up on the scene. LLA can much more efficiently plan for and budget resources, and the client experience could be much smoother and informative if done outside a busy court office.

## Scope

We will build out a secure digital intake experience that Lakeshore can advertise to clients with inserts placed in court notices. These inserts will contain a link and a QR code that takes the client to a site which:

* Collects the same information as the current intake form
* Provides contextual help throughout the process to guide and assure the client
* Provides rules-based feedback regarding qualification
* Make a rule-based determination of the appropriate agency to route to (if not LLA)
* Integrate with the CRM of the receiving agency to insert a new case with the application data
* Makes an admin backend possible with appropriate monitoring and alerting to govern the application activity

This will be an entirely net new application for the following reasons:

* The services provided are not solely provided by Lakeshore
* The existing site, hotline, and generic digital application are not backed by enough funding to be scale
* The existing site, hotline, and generic digital application were not built or maintained by any party that can meaningfully participate in the project

We will first build out the intake form capability in a traditional workflow manner. This will allow us to stand up the site and supporting architecture, establish the business rules of the app, and build out APIs and content that drive the experience.

We will then look to layer in conversational AI, which will allow the intake process to feel much more natural, caring, and helpful to the user. We will provide options for the user to personalize their experience (“I’d like to fill out a form” vs “I’d like help with this”), but at least one path should be managed by a conversational, generative AI assisted experience.

## Technical Considerations

Due to financial and logistical constraints, we should strive to keep this app running as locally as possible. For MVP, we do not need a login system or have a need for clients to return to the experience from a different device. We should explore ways of running very small open source LLMs on-device and strive to incur 0 cloud services costs if possible. Data will not be stored off-device until it is sent to the receiving case management system at the end of the process.

## Resources

* Hackweek Experiment Link: <https://cheesefactory.foc.zone/D171843?idea_count=85>
* [LLA Website](https://www.lakeshorelegalaid.org/)
* 
* 

Work Breakdown

## Feature: Initial Setup

**Goal:** to have get the project ready for team contributions. Consider this a “hello world” feature. The intent is to cover any initial scaffolding, design, and tech stack decisions and setup.

**Requirements:**

1. The app should build
2. It should present a basic hello world type page
3. It should contain all setup necessary to proceed developing a modern web-component based SPA.
4. It should have basic styling included.
5. It should be templated with the ability to change the logo, company name, and basic content easily.
6. It should be able to run locally without any connection to cloud hosting.
7. It should be available from a github repo that contains a reasonable amount of documentation and guidelines for contribution.

**Acceptance Criteria:**

1. See above

**Non-Functional Requirements:**

1. The framework used should be the latest LTS of NextJS.
2. It should use typescript.
3. It should use Tailwind CSS for styling.
4. It should be assumed this will run from static files and not require any cloud services, backend server, or API’s after the production build is created.

## Feature: Welcome Page

**Goal:** The homepage of the app is meant to welcome the user and clearly explain the experience. It should be informative, warm, reassuring, and simple. It will contain more content over time, but for this scope we’re mostly concerned about making the CTA (the form) the main goal of this page.

**Requirements:**

1. A header section with the logo and company name.
2. A welcome message with a short amount of helpful content that describes what this experience is for.
3. CTA that encourages the user to move forward into the app.

**Non-Functional Requirements:**

## Feature: Full page form

**Goal:** this experience is meant to be a close-to 1:1 replica of the paper form, for users who’d rather just get it all done on one screen. Technically, doing this first will allow us to build the separate form components and data model so that we can more easily de-compose the experience later for the multi-step and then conversational experiences.

**Requirements:**

1. All form fields from the PDF must be included
2. The addendum form should come after this in the design, on the same page.
3. All form fields should be separate react components to enable maximum composability later.
4. The form does not actually need to submit successfully, that will follow in the next feature.

**Acceptance Criteria:**

1. When I navigate to the form page, I should see a 1:1 replica (with reasonable design changes to accommodate a responsive web form) of the main form and the addendum linked above and be able to fill in all form fields.

## Feature: Form Submission

**Context:**

**Goal:**

**Requirements:**

**Acceptance Criteria:**

**Non-Functional Requirements:**

**Dependencies:**

## Feature: Multi Step Form Step 0 – Citizenship and disclaimers

**Context:**

**Goal:**

**Requirements:**

**Acceptance Criteria:**

**Non-Functional Requirements:**

**Dependencies:**

## Feature: Multi Step Form Step 1 – Basic Client Info

**Context:**

**Goal:**

**Requirements:**

**Acceptance Criteria:**

**Non-Functional Requirements:**

**Dependencies:**

## Feature: Multi Step Form Step 2 – Legal Issue Information

**Context:**

**Goal:**

**Requirements:**

**Acceptance Criteria:**

**Non-Functional Requirements:**

**Dependencies:**

## Feature: Multi Step Form Step 3 – Client Financial Details

**Context:**

**Goal:**

**Requirements:**

**Acceptance Criteria:**

**Non-Functional Requirements:**

**Dependencies:**

## Feature: Multi Step Form Step 4 – Client Demographics

**Context:**

**Goal:**

**Requirements:**

**Acceptance Criteria:**

**Non-Functional Requirements:**

**Dependencies:**

## Feature: AI Form walkthrough

**Context:**

**Goal:**

**Requirements:**

**Acceptance Criteria:**

**Non-Functional Requirements:**

**Dependencies:**