



REQUEST FOR PROPOSALS

ADMINISTRATIVE OFFICE OF THE COURTS
(AOC)

REGARDING:

JUSTICECORPS PROGRAM EVALUATION AND
DATA EVALUATION

NUMBER: COSSO 2-14-LM

PROPOSALS DUE:

MARCH 11, 2014, NO LATER THAN 2:00 P.M.
PACIFIC TIME

1.0 PURPOSE FOR THIS REQUEST FOR PROPOSALS (“RFP”)

- 1.1 Judicial Council of California – Administrative Office of the Courts (“AOC”). The Judicial Council of California, chaired by the Chief Justice of California, is the chief policy making agency of the California judicial system. The California Constitution directs the council to improve the administration of justice by surveying judicial business, recommending improvements to the courts, and making recommendations annually to the Governor and the Legislature. The council also adopts rules for court administration, practice, and procedure, and performs other functions prescribed by law. The AOC is the staff agency for the council and assists both the council and its chair in performing their duties.
- 1.2 The Court Operations and Special Services Office (“COSSO”), housed in the AOC’s Judicial and Court Operations Services Division, is dedicated to providing direct services, resources and program support to the California courts to facilitate access to justice for the people of the state. COSSO seeks the services of a program evaluation consultant (“Contractor”) with expertise in analyzing program-level data collection and advising on validity of data collected by program staff. The Proposer is expected to be familiar with how successful court and/or community-based legal services programs are implemented, especially those that integrate volunteer or student efforts into their program model. The Contractor will be asked to create the foundation for the next phase of the JusticeCorps Program evaluation, designed within the parameters required by the Corporation for National and Community Service and CaliforniaVolunteers, federal and state AmeriCorps funding agencies, respectively. This large-scale evaluation will launch in Fall 2014 and incorporate scientific methodology and elements to measure what the community served would look like without the JusticeCorps Program.
- 1.3 This Request for Proposals (“RFP”) is the means for prospective program evaluation proposers to submit their qualifications and request selection as the Contractor for the Work of this RFP, as defined in Attachment 2, Exhibit D, Work to be Performed. The expertise required is (i) possess program analysis skills with a focus on demonstrating the program’s impact on the community it serves and comparisons between sites where the program does and does not exist, (ii) identify elements that lead to successfully implemented court based or community based legal services programs; (iii) implement data validation methodologies, to analyze standardization of program data collection; (iv) design measurement-based questions that assess the program’s effectiveness by using a control group, such as analyzing the differences between courts that do not utilize JusticeCorps members in their self-help centers and those that do, and (v) possess experience with or knowledge of community service, current trends in volunteerism, and/or AmeriCorps programs and the services they deliver.
- 1.4 It is the intention of the AOC to award a single contract for the Project estimated to be March 24, 2014 through October 31, 2014. The compensation for Work under this Project will range between \$12,500 and \$15,000. Compensation for allowable transportation expenses will be \$1,100 to \$1,500. *See sub-paragraphs 3.1 and 7.1.1.2, below.*

2.0 BACKGROUND INFORMATION

- 2.1 California JusticeCorps Program. The California JusticeCorps Program is a collaborative project of the AOC, Superior Courts of California, Counties of Los Angeles, Alameda, San Francisco, San Mateo, Santa Clara and San Diego; various University of California and California State University campuses; and community based legal aid services providers. Created in 2004 with an AmeriCorps grant, the JusticeCorps Program offers a unique approach to addressing one of the most pressing issues faced by courts around the country today: providing equal access to justice. Moreover, the program's companion objective is to promote diversity among pre-law professionals.
- 2.2 JusticeCorps Program ("Program"). The JusticeCorps Program recruits and trains nearly 300 diverse undergraduate students ("members") annually to augment overburdened court and legal aid staff who assist self-represented litigants in court-based self-help programs in Los Angeles, the Bay Area and San Diego. These trained JusticeCorps members provide in-depth and individualized services to self-represented litigants in a variety of civil matters, often in the litigant's own languages. Parties are given clear information and options, and then connected quickly to the right resources. Litigants are assisted in completing appropriate and accurate pleadings, written orders and judgments under attorney supervision and, in the process, provided with a better general understanding of the court system. In exchange for their service, members are provided an education award that can be applied toward educational expenses as well as an invaluable opportunity to learn about the law outside of the classroom.
- 2.3 Program Goals. The JusticeCorps Program aims to increase services to self-represented litigants in court based self-help centers, enhance the quality of that service and foster diversity among future professionals in law and law-related fields. JusticeCorps meets these goals by recruiting and training a diverse group of civically minded students to work as assistants to court staff (typically attorneys and clerks) working in court-based self-help centers.
- 2.4 Websites. Bidders for this RFP can learn more about the California JusticeCorps program at: <http://courts.ca.gov/programs-justicecorps.htm>.

Bidders can also learn about the California Judicial Branch's commitment to Equal Access at: <http://courts.ca.gov/programs-equalaccess.htm>.

3.0 DESCRIPTION OF SERVICES

- 3.1 The Contractor will analyze data collected during the 2013-2014 program year against the Program's existing data validation plan and will report at intervals on findings from that analysis. The Contractor will also consult with JusticeCorps staff and use past evaluation reports and its knowledge of AmeriCorps evaluation guidelines to formulate the research question for the next phase of evaluation. The Proposer will submit a timeline and report making recommendations on success and areas for improvement in data collection, and a timeline and a report recommending one or more research questions

and appropriate methodology for the 2014-2015 evaluation. Work will be handled mainly by remote access, with phone and intermittent in-person meetings at the AOC – San Francisco Office. Work will include travel to the Bay Area, Los Angeles, and/or San Diego courts and other select courts.

3.2 Knowledge of the JusticeCorps Program, community service, current evaluation trends and methodology, and/or AmeriCorps programs will be beneficial to successfully completing the Scope of Work set forth in Exhibit D, Work to be Performed.

3.3 Website. For additional information about this solicitation, see the California Courts’ Website located at www.courts.ca.gov/rfps.htm (“Courts’ Website”).

4.0 TIMELINE FOR THIS RFP

The AOC has developed the following list of key events related to this RFP. All dates are subject to change at the discretion of the AOC.

EVENT	DATE
RFP issued	February 19, 2014
Deadline for questions to Solicitations@jud.ca.gov	February 27, 2014, no later than 2:00 PM (PT)
Questions and answers posted (<i>estimate only</i>)	March 3, 2014
Latest date and time proposal may be submitted	March 11, 2014, no later than 2:00 PM (PT)
Evaluation of proposals. This period includes any interviews (<i>estimate only</i>)	March 11 through March 14, 2014
Notice of Intent to Award (<i>estimate only</i>)	March 17, 2014
Negotiations and execution of contract (<i>estimate only</i>)	March 17 through March 21, 2014
Contract start date (<i>estimate only</i>)	March 24, 2014
Contract end date (<i>estimate only</i>)	October 31, 2014

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5.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (Non-IT Services):	These rules govern this solicitation.
Attachment 2: AOC Standard Terms and Conditions	<p>If selected, the person or entity submitting a proposal (the “Proposer”) must sign this AOC Standard Form agreement.</p> <p>Note: The provisions marked with an (*) within the Terms and Conditions are minimum contract terms and conditions (“Minimum Terms”).</p>
Attachment 3: Proposer’s Acceptance of Terms and Conditions	<p>On this form, the Proposer must indicate acceptance of the Terms and Conditions or identify exceptions to the Terms and Conditions.</p> <p>Note: The provisions marked with an (*) are minimum contract terms and conditions (“Minimum Terms”).</p> <p>A proposal that takes a material exception (addition, deletion, or other modification) to a Minimum Term will be deemed non-responsive. The AOC, in its sole discretion, will determine what constitutes a material exception. A material exception to a Minimum Term may render a proposal non-responsive.</p>
Attachment 4: General Certifications Form	The Proposer must complete the General Certifications Form and submit the completed form with its proposal.
Attachment 5: Darfur Contracting Act Certification Form	The Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.
Attachment 6: Payee Data Record Form	This form contains information the AOC requires in order to process payments and must be submitted with the proposal.
Attachments 3-6 must be signed by an authorized representative of the Proposer.	

6.0 PAYMENT INFORMATION

- 6.1 Subject to the terms in Attachment 2, Exhibit C, Payment Provisions, payment will be made in the form of not-to-exceed amounts at completion of each Deliverable.
- 6.2 The total cost for the Work of this RFP shall include transportation expenses. The six (6) Deliverables are specified in *Attachment 2, Exhibit D – Work to be Performed*.

7.0 PROPOSAL CONTENTS

7.1 **Technical Proposal.** The following information must be included in the Technical Proposal. A Proposal lacking any of the following information may be deemed non-responsive.

7.1.1 Proposed method to complete the work.

7.1.1.1 Propose overall project plan and organization. Include: (i) a plan for reviewing existing data validation plan, method for analyzing data, and timeline for data analysis, and (ii) a plan for examining and incorporating existing evaluation requirements into evaluation recommendations

7.1.1.2 Propose methodology. Include plan for gathering input from participating JusticeCorps courts (Los Angeles, the Bay Area, and San Diego) and select courts that do not participate in the program and for examining and incorporating previously completed evaluations of the program.

7.1.1.3 Propose method for presenting findings and recommendations on data analysis and on foundation for future evaluation.

7.1.2 Experience on similar assignments, with an emphasis on experience evaluating use of the same program model and methods of data collection in different environments.

7.1.2.1 Proposal includes examples of other research projects that combine quantitative and qualitative data.

7.1.2.2 Proposer has demonstrated experience with research related to court-based or community-based volunteer-driven legal services programs.

7.1.3 The Proposer's name, address, telephone and fax numbers, and federal tax identification number. Note: If the Proposer is a sole proprietor using his or her social security number, the social security number will be required before finalizing a contract. If Proposer is a sole proprietor using his or her social security number, the social security number will be required before finalizing a contract.

7.1.4 Name, title, address, telephone number, and email address of the individual who will act as the Proposer's designated representative for purposes of this RFP.

7.1.5 For each key staff member, provide their resume with background and experience as well as the individual's ability and experience in conducting the proposed activities.

7.1.6 Names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Proposer has conducted similar services. The AOC may check references listed by the Proposer.

7.1.7 Acceptance of the Terms and Conditions.

On Attachment 3, Proposer's Acceptance of Terms and Conditions, the Proposer must check the appropriate box and sign the form. If the Proposer marks the second box, it must provide the required additional materials. An "exception" includes any addition, deletion, or other modification.

7.1.8 Certifications, Attachments, and other requirements.

7.1.8.1 Submit one (1) original and one (1) copy of the original signed documents for the following:

- Attachment 2 – AOC Standard Terms and Conditions (submit only if there are exceptions/modifications as indicated on Attachment 3)
- Attachment 3 – Proposer's Acceptance of Terms and Conditions
- Attachment 4 – General Certifications Form
- Attachment 5 – Darfur Contracting Act Certification Form
- Attachment 6 – Payee Data Record Form

Note: If exceptions are identified in Attachment 2, the Proposer must also submit (i) a redlined version of the Terms and Conditions with Attachment 2 that shows all proposed changes, and (ii) a written explanation or rationale for each exception and/or proposed change.

7.1.8.2 The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.

7.1.8.3 The Proposer must complete the Darfur Contracting Act Certification (Attachment 5) and submit the completed certification with its proposal.

7.1.8.4 The Proposer must complete the Payee Data Record Form (Attachment 6) and submit the completed certification with its proposal

7.1.8.5 If Proposer is a California corporation, limited liability company ("LLC"), limited partnership ("LP"), or limited liability partnership ("LLP"), proof that Proposer is in good standing in California. If Proposer is a foreign corporation, LLC, LP, or LLP, and Proposer conducts or will conduct (if awarded the contract) intrastate business in California, provide proof that Proposer is qualified to do business and in good standing in California. If Proposer is a foreign corporation, LLC, LP, or LLP, and Proposer does not (and will not if awarded the contract)

conduct intrastate business in California, proof that Proposer is in good standing in its home jurisdiction.

7.1.8.6 Proof of financial solvency or stability (e.g., balance sheets and income statements).

7.2 **Cost Proposal.** The following information must be included in the Cost Proposal.

7.2.1 A detailed line item budget for Compensation for Contract Work showing cost for each of the six Deliverables set forth in *Attachment 2, Exhibit D, Work to be Performed* and showing the total cost for the six Deliverables combined. This budget will identify the Key Personnel, titles and hourly rates. Cost is determined by multiplying hourly rate by the number of hours. The cost per Deliverable shall be a not-to-exceed amount.

7.2.2 Compensation for Transportation Expenses shall be in addition to the Compensation for Contract Work and together they shall be the total Contract Amount for the Work described herein. Transportation expenses are delineated in *Attachment 2, Exhibit C, Payment Provisions*. Transportation expenses shall be applied as needed, throughout the period of the Project, and shall not be a part of the Cost Proposal.

7.2.3 Fully explain and justify all budget line items in a narrative entitled “Budget Justification.”

NOTE: It is unlawful for any person engaged in business within this state to sell or use any article or product as a “loss leader” as defined in Section 17030 of the Business and Professions Code.

8.0 SUBMISSIONS OF PROPOSALS

8.1 Proposals should provide straightforward, concise information that satisfies the requirements of the “Proposal Contents” section below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the RFP’s instructions, requirements, clarity and completeness of content.

8.2 The Proposer must submit its proposal in two parts, the Technical Proposal and the Cost Proposal.

8.2.1 The Proposer will submit **one (1) original and three (3) copies** each of the Technical and Cost Proposals. The originals of each Proposal must be signed by an authorized representative of the Proposer. The Technical Proposal original and copies shall be in a sealed inside envelope. The Cost Proposal original and copies shall be in a sealed inside envelope. Both Technical and Cost Proposals shall be in one (1) outside envelope. The RFP title and number shall be written on the outside envelope.

8.2.2 The Proposer must submit a complete electronic version of each proposal on CD-ROM. *The files contained on the CD-ROM should be in editable/unprotected Word and/or Excel formats.*

8.2.3 Only hard copy Proposals will be accepted. Proposals may not be submitted by facsimile or email. Proposals must be sent by registered or certified mail, courier service (e.g. FedEx), or delivered by hand to the address provided below.

8.3 Proposals must be delivered by the date and time listed on the coversheet of this RFP to:

Judicial Council of California
Administrative Office of the Courts
Fiscal Services Office, Business Services
Attn: Nadine McFadden, RFP: COSSO 3-14-LM
455 Golden Gate Avenue, 6th Floor
San Francisco, CA 94102-3688

9.0 OFFER PERIOD

A Proposer's proposal is an irrevocable offer for ninety (90) days following the proposal due date. In the event a final contract has not been awarded within this period, the AOC reserves the right to negotiate extensions to this period.

10.0 EVALUATION OF PROPOSALS

At the time proposals are opened, each proposal will be checked for the presence or absence of the required proposal contents.

The AOC will evaluate the proposals on a 100-point scale using the criteria set forth in the table below. Award, if made, will be to the highest-scored proposal.

If a proposer is selected for award of this RFP, the AOC will post an Intent to Award notice on the Courts' Website.

CRITERION	MAXIMUM # POINTS
Quality of work plan submitted	25
Experience on similar assignments	20
Cost	30
Credentials of staff to be assigned to the project	5
Acceptance of the Terms and Conditions	10
Ability to meet timing requirements to complete the project	10

11.0 INTERVIEWS

The AOC may conduct interviews with Proposers to clarify aspects set forth in their proposals or to assist in finalizing the ranking of top-ranked proposals. The interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the AOC – San Francisco office. The AOC will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The AOC will notify eligible Proposers regarding interview arrangements.

12.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

PROPOSALS ARE SUBJECT TO DISCLOSURE PURSUANT TO APPLICABLE PROVISIONS OF THE CALIFORNIA PUBLIC CONTRACT CODE AND RULE 10.500 OF THE CALIFORNIA RULES OF COURT. The AOC will not disclose (i) social security numbers, or (ii) balance sheets or income statements submitted by a Proposer that is not a publicly traded corporation. All other information in proposals will be disclosed in response to applicable public records requests. Such disclosure will be made regardless of whether the proposal (or portions thereof) is marked “confidential,” “proprietary,” or otherwise, and regardless of any statement in the proposal (a) purporting to limit the AOC’s right to disclose information in the proposal, or (b) requiring the AOC to inform or obtain the consent of the Proposer prior to the disclosure of the proposal (or portions thereof). Any proposal that is password protected, or contains portions that are password protected, may be rejected. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

13.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE

The AOC has waived the inclusion of DVBE participation in this solicitation.

14.0 PROTESTS

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract Manual (see www.courts.ca.gov/documents/jbcl-manual.pdf). Failure of a Proposer to comply with the protest procedures set forth in this chapter will render a protest inadequate and non-responsive, and will result in rejection of the protest. The deadline for the AOC to receive a solicitation specifications protest is the proposal due date. Protests should be sent to:

AOC – Business Services
Attn: Protest Hearing Officer
455 Golden Gate Avenue, Sixth Floor
San Francisco, CA 94102-3688

END OF RFP