



**Judicial Council of California**  
**Administrative Office of the Courts**

455 Golden Gate Avenue ♦ San Francisco, CA 94102-3660  
Telephone 415-865-7740 ♦ Fax 415-865-4334 ♦ TDD 415-865-4272

RONALD M. GEORGE  
*Chief Justice of California*  
*Chair of the Judicial Council*

WILLIAM C. VICKREY  
*Administrative Director of the Courts*

RONALD G. OVERHOLT  
*Chief Deputy Director*

**TO:** POTENTIAL BIDDERS

**FROM:** Administrative Office of the Courts  
Executive Office Programs

**DATE:** April 18, 2002

**SUBJECT/PURPOSE OF MEMO:** REQUEST FOR PROPOSALS  
Introduction of the Spanish-language edition  
of the California Courts Online Self-Help Center

**ACTION REQUIRED:** You are invited to review and respond to the attached Request for  
Proposals (“RFP”):  
  
Project Title: California Courts Online Self-Help Center: Spanish Edition  
RFP Number: 02-04

**DEADLINE:** **Proposals must be received by 5 p.m. on April 30, 2002**

**SUBMISSION OF PROPOSAL:** Proposals should be sent to:  
**Judicial Council of California**  
**Administrative Office of the Courts**  
**Attn: Sherri Eng**  
**455 Golden Gate Avenue**  
**San Francisco, CA 94102**

**CONTACT FOR FURTHER INFORMATION:**

<b>NAME:</b>	<b>TEL:</b>	<b>FAX:</b>	<b>E-MAIL:</b>
Project Manager	415-865-7544	415-865-4334	sherri.eng@jud.ca.gov

## 1.0 GENERAL INFORMATION

### 1.1 Background

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 Administrative Office of the Courts (AOC) is the staff agency for the Council and assists both the Council and its chair in performing their duties.

- 1.2 In the last decade, the California court system has recorded a surge of self-represented litigants—individuals who come to court without an attorney. This group encompasses the majority of the 6 million annual traffic filings, nearly 400,000 annual small claims filings, nearly half of the estimated 94,500 child custody mediation cases each year, and most child support cases. Because they are largely unfamiliar with court procedures and forms, these individuals require more time and attention from court staff. By the late 1990s, serving this growing population has become one of the system's most urgent challenges.
- 1.3 In early 1999, following discussions with representatives from the state's trial courts and others involved in serving self-represented litigants, staff at the AOC began to examine new ways to assist self-represented litigants, including onsite kiosks, trained volunteer staffing, and revised court rules. The group also began to post materials to the California Courts Web site ([www.courtinfo.ca.gov](http://www.courtinfo.ca.gov)).
- 1.4 In July 2001, the AOC launched the California Courts Online Self-Help Center. The new site at [www.courtinfo.ca.gov/selfhelp](http://www.courtinfo.ca.gov/selfhelp) contains hundreds of tools, resources, and links to help Californians find legal assistance, learn about state law, work smarter with an attorney, and represent themselves in some legal matters. The site provides easy-to-understand descriptions of court procedures, step-by-step guides for choosing and completing court forms, and links to local legal service organizations, and lawyer referral programs. Some 20,000 users visited the site in the four days following the public launch. By year's end, the number of visitors approached a half million.
- 1.5 In July 2002, The AOC expects to introduce a Spanish-language translation of the Online Self-Help Center.

## **2.0 PURPOSE OF THIS RFP**

The AOC seeks to identify and retain a qualified service provider to create and implement a public education program to build awareness of an online self-help center for Spanish-speaking Californians in need of legal help and court services. This RFP is the means for prospective service providers to submit their qualifications to the AOC and request selection as a service provider.

## **3.0 SCOPE OF SERVICES**

- 3.1. Services are expected to be performed by the consultant between June and October 2002.
- 3.2. The consultant will be asked to:
  - 3.2.1 Develop and present a detailed communications plan for the introduction of the new site to prospective users and referral groups.
  - 3.2.2 Develop the creative themes, messages, and materials required for the recommended campaign.
  - 3.2.3 Produce informational materials and/or place media required by the recommended campaign (inclusive of stated budget).
  - 3.2.4 Report on program results.

## **4.0 SPECIFICS OF A RESPONSIVE PROPOSAL**

The following information shall be included in the proposal:

- 4.1 Name, address, telephone and fax numbers, and social security number or federal tax identification number.
- 4.2 Six copies of the proposal signed by an authorized representative of the service provider, including name, title, address, and telephone number of one individual who is the responder's designated representative.
- 4.3 Resumes describing the background and experience of key staff, as well as each individual's ability and experience in conducting the proposed activities.
- 4.4 Describe key staff's knowledge of the requirements necessary to complete this project.

- 4.5 Names, addresses, and telephone numbers of a minimum of five (5) clients for whom the consultant has conducted similar services. The AOC may check references listed by the consultant.
- 4.6 Responsive proposals should provide straightforward, concise information that satisfies the requirements noted above. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the state's instructions, requirements of this RFP, and completeness and clarity of content.
- 4.7 Overall plan with time estimates for completion of all work required.
- 4.8 Method to complete the Project:
  - 4.8.1 Proposed strategic approach to the challenges of increasing awareness of the availability of the site with limited resources.
  - 4.8.2 Preliminary allocation of budget among communications tactics and tools.
  - 4.8.4 Proposed project and team organization.

## **5.0 COST PROPOSAL**

Submit a detailed line item budget showing total cost of the services. Fully explain and justify all budget line items in a narrative entitled "Budget Justification."

The total cost for consultant services will not exceed \$57,000 inclusive of personnel, materials (including printing costs), computer support, travel, lodging, per diem, and overhead rates. The method of payment to the consultant will be by cost reimbursement.

## **6.0 RIGHTS**

The AOC reserves the right to reject any and all proposals, in whole or in part, as well as the right to issue similar RFPs in the future. This RFP is in no way an agreement, obligation, or contract and in no way is the AOC or the State of California responsible for the cost of preparing the proposal. One copy of a submitted proposal will be retained for official files and becomes a public record.

Only written responses will be accepted. Responses should be sent by registered or certified mail or by hand delivery. The consultant [service provider] may send the AOC an advance copy by facsimile to the Project Manager at the fax number listed in Section 7.0, below. However, sending an advance copy by fax does not satisfy the submission requirements of paragraph 4.2.

## **7.0 PROJECT MANAGEMENT**

The Project Manager for this RFP process is:

Sherry Eng  
Executive Office Programs  
Administrative Office of the Courts  
455 Golden Gate Avenue  
San Francisco, CA 94102-3660  
Phone: 415-865-7544  
Fax: 415-865-4334  
E-mail: sherry.eng@jud.ca.gov

## **8.0 EVALUATION OF PROPOSALS**

Proposals will be evaluated by the AOC using the following criteria:

- a. Quality of work plan submitted
- b. Experience on similar assignments
- c. Credentials of staff to be assigned to the project
- d. Ability to meet timing requirements to complete the project
- e. Reasonableness of cost projections

## **9.0 ADDITIONAL REQUIREMENTS**

It may be necessary to interview prospective service providers to clarify aspects of their submittal. If conducted, interviews will likely be conducted by telephone conference call. The AOC will notify prospective service providers regarding the interview arrangements.

## **10.0 PROPOSED CONTRACT TERMS AND ADMINISTRATIVE RULES**

Contracts with successful firms will be signed by the parties on a State of California Standard Agreement form and will include terms appropriate for this project. Generally, the terms of the contract will include, but are not limited to: (1) completion of the project within the timeframe provided; (2) no additional work authorized without prior approval; (3) no payment without prior approval; (4) funding availability subject to Legislature; (5) termination of contract under certain conditions; (6) indemnification of the State; (7) approval by the State of any subcontractors; (8) national labor relations board, drug-free workplace, nondiscrimination, and ADA requirements; and (9) minimum appropriate insurance requirements.

Incorporated in this RFP, and attached as Attachment A, is a document entitled “Administrative Rules Governing Requests for Proposals. Consultants shall follow these rules in preparation of their proposals.

**ATTACHMENT A**

**JUDICIAL COUNCIL OF CALIFORNIA  
ADMINISTRATIVE OFFICE OF THE COURTS**

**ADMINISTRATIVE RULES GOVERNING REQUESTS FOR PROPOSALS**

**A. General**

1. This solicitation document, the evaluation of proposals, and the award of any contract shall conform with current competitive bidding procedures as they relate to the procurement of goods and services. A vendor's proposal is an irrevocable offer for 30 days following the deadline for its submission.
2. A nondiscrimination clause will be included in any contract that ensues from this solicitation document.
3. In addition to explaining the State's requirements, the solicitation document includes instructions, which prescribe the format and content of proposals.

**B. Errors in the solicitation document**

1. If a vendor submitting a proposal discovers any ambiguity, conflict, discrepancy, omission, or other error in this solicitation document, the vendor shall immediately provide the State with written notice of the problem and request that the solicitation document be clarified or modified. Without disclosing the source of the request, the State may modify the solicitation document prior to the date fixed for submission of proposals by issuing an addendum to all vendors to whom the solicitation document was sent.
2. If prior to the date fixed for submission of proposals a vendor submitting a proposal knows of or should have known of an error in the solicitation document but fails to notify the State of the error, the vendor shall bid at its own risk, and if the vendor is awarded the contract, it shall not be entitled to additional compensation or time by reason of the error or its later correction.

**C. Questions regarding the solicitation document**

1. If a vendor's question relates to a proprietary aspect of its proposal and the question would expose proprietary information if disclosed to competitors, the vendor may submit the question in writing, conspicuously marking it as "CONFIDENTIAL." With the question, the vendor must submit a statement explaining why the question is sensitive. If the State concurs that the disclosure of the question or answer would expose proprietary information, the question

## Attachment A

will be answered, and both the question and answer will be kept in confidence. If the State does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the vendor will be notified.

2. If a vendor submitting a proposal believes that one or more of the solicitation document's requirements is onerous or unfair, or that it unnecessarily precludes less costly or alternative solutions, the vendor may submit a written request that the solicitation document be changed. The request must set forth the recommended change and vendor's reasons for proposing the change. Any such request must be submitted to **Sherri Eng** at the Administrative Office of the Courts by **5 p.m. on April 26, 2002**.

### **D. Addenda**

1. The State may modify the solicitation document prior to the date fixed for submission of proposals by faxing an addendum to the vendors to whom the solicitation document was sent. If any vendor determines that an addendum unnecessarily restricts its ability to bid, it must notify **Sherri Eng** at the Administrative Office of the Courts no later than one day following the receipt of the addendum.

### **E. Withdrawal and resubmission/modification of proposals**

1. A vendor may withdraw its proposal at any time prior to the deadline for submitting proposals by notifying the State in writing of its withdrawal. The notice must be signed by the vendor. The vendor may thereafter submit a new or modified proposal, provided that it is received at the Administrative Office of the Courts no later than **5 p.m. on April 30, 2002**. Modification offered in any other manner, oral or written, will not be considered. Proposals cannot be changed or withdrawn after **5 p.m. on April 30, 2002**.

### **F. Evaluation process**

1. An evaluation team will review in detail all proposals that are received to determine the extent to which they comply with solicitation document requirements.
2. If a proposal fails to meet a material solicitation document requirement, the proposal may be rejected. A deviation is material to the extent that a response is not in substantial accord with solicitation document requirements. Material deviations cannot be waived. Immaterial deviations may cause a bid to be rejected.

## Attachment A

3. Proposals that contain false or misleading statements may be rejected if in the State's opinion the information was intended to mislead the state regarding a requirement of the solicitation document.
4. Cost sheets will be checked only if a proposal is determined to be otherwise qualified. All figures entered on the cost sheets must be clearly legible.
5. During the evaluation process, the State may require a vendor's representative to answer questions with regard to the vendor's proposal. Failure of a vendor to demonstrate that the claims made in its proposal are in fact true may be sufficient cause for deeming a proposal nonresponsive.

### **G. Rejection of bids**

1. The State may reject any or all proposals and may or may not waive an immaterial deviation or defect in a bid. The State's waiver of an immaterial deviation or defect shall in no way modify the solicitation document or excuse a vendor from full compliance with solicitation document specifications. The AOC reserves the right to accept or reject any or all of the items in the proposal, to award the contract in whole or in part and/or negotiate any or all items with individual vendors if it is deemed in the AOC's best interest. Moreover, the AOC reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or against the best interest of the government.

### **H. Award of contract**

1. Award of contract, if made, will be in accordance with the solicitation document to a responsible vendor submitting a proposal compliant with all the requirements of the solicitation document and any addenda thereto, except for such immaterial defects as may be waived by the State.
2. The State reserves the right to determine the suitability of proposals for contracts on the basis of a proposal's meeting administrative requirements, technical requirements, its assessment of the quality of service and performance of items proposed, and cost.

### **I. Decision**

1. Questions regarding the State's award of any business on the basis of proposals submitted in response to this solicitation document, or on any related matter, should be addressed to **Sherri Eng, Administrative Office of the Courts, 455 Golden Gate Avenue, San Francisco, CA 94102.**

### **J. Execution of contracts**

Attachment A

1. The State will make a reasonable effort to execute any contract based on this solicitation document within 30 days of selecting a proposal that best meets its requirements.
2. A vendor submitting a proposal must be prepared to use a standard state contract form rather than its own contract form.

**K. Protest procedure**

1. The Administrative Office of the Courts intends to be completely open and fair to all vendors in selecting the best possible system within budgetary and other constraints described in the solicitation document. In applying evaluation criteria and making the selection, members of the evaluation team will exercise their best judgment.
2. A vendor submitting a proposal may protest the award if it meets all the following conditions:
  - a. the vendor has submitted a proposal which it believes to be responsive to the solicitation document;
  - b. the vendor believes that its proposal meets the state's administrative requirements and technical requirements, proposes items of proven quality and performance, and offers a competitive cost to the State; and
  - c. the vendor believes that the State has incorrectly selected another vendor submitting a proposal for an award.
3. A vendor submitting a proposal who is qualified to protest should contact the Contract Officer at the Administrative Office of the Courts at the address given below or call him at 415-865-7989.

Stephen Saddler  
Contracts Officer  
Administrative Office of the Courts  
455 Golden Gate Avenue  
San Francisco, CA 94102-3660

4. If the Contract Officer is unable to resolve the protest to the vendor's satisfaction, the vendor should file a written protest within five working days of the contract award notification. The written protest must state the facts surrounding the issue and the reasons the vendor believes the award to be invalid. The protest must be sent by certified or registered mail or delivered personally to:

Grant Walker  
Business Services Manager  
Administrative Office of the Courts  
455 Golden Gate Avenue  
San Francisco, CA 94102-3660

A receipt should be requested for hand-delivered material.

**L. News releases**

1. News releases pertaining to the award of a contract may not be made without prior written approval of the Director of the Administrative Office of the Courts.

**M. Disposition of materials**

1. All materials submitted in response to this solicitation document will become the property of the State of California and will be returned only at the State's option and at the expense of the vendor submitting the proposal. One copy of a submitted proposal will be retained for official files and become a public record. However, any confidential material submitted by a vendor that was clearly marked as such will be returned upon request.

**N. Payment**

1. Payment terms will be specified in any agreement that may ensue as a result of this solicitation document.
2. **THE STATE DOES NOT MAKE ANY ADVANCE PAYMENT FOR SERVICES.** Payment is normally made based upon completion of tasks as provide in the agreement between the State and the selected vendor. The State may withhold ten percent of each invoice until receipt of the final product. The amount of the withhold may depend upon the length of the project and the payment schedule provide in the agreement between the State and the selected vendor.

Attachment B  
DVBE COMPLIANCE DOCUMENTATION AND CERTIFICATION OF PRIME  
BIDDER

TITLE: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The goal of awarding of at least three percent (3%) of the total dollar contract amount to Disabled Veterans Business Enterprise (DVBE) has been achieved for this Project:

Yes \_\_\_\_\_ No \_\_\_\_\_

Please complete Part A and Part B on the following pages. "Contractors Tier" is referred to several times below; use the following definitions for tier:

- 0 = Prime or Joint Contractor;
- 1 = Prime subcontractor/supplier;
- 2 = Subcontractor/supplier of level 1 subcontractor/supplier

**PART A – COMPLIANCE WITH DVBE GOALS**

**PRIME CONTRACTOR**

Company Name: \_\_\_\_\_

Nature of Work \_\_\_\_\_ Tier: \_\_\_\_\_

Claimed Value: DVBE \$ \_\_\_\_\_

Percentage of Total Contract Cost DVBE \_\_\_\_\_%

**SUBCONTACTORS/SUBCONTRACTOR/VENDORS/SUPPLIERS**

Company Name: \_\_\_\_\_

Nature of Work \_\_\_\_\_ Tier: \_\_\_\_\_

Claimed Value: DVBE \$ \_\_\_\_\_

Percentage of Total Contract Cost: DVBE \_\_\_\_\_%

INCOMPLETE DOCUMENTATION MAY RESULT IN DISQUALIFICATION FROM  
FURTHER PARTICIPATION IN SELECTION PROCESS FOR THIS CONTRACT.

Attachment B  
DVBE COMPLIANCE DOCUMENTATION AND CERTIFICATION OF PRIME  
BIDDER

Company Name: \_\_\_\_\_

Nature of Work \_\_\_\_\_ Tier: \_\_\_\_\_

Claimed Value: DVBE \$ \_\_\_\_\_

Percentage of Total Contract Cost DVBE \_\_\_\_\_%

Company Name: \_\_\_\_\_

Nature of Work \_\_\_\_\_ Tier: \_\_\_\_\_

Claimed Value: DVBE \$ \_\_\_\_\_

Percentage of Total Contract Cost DVBE \_\_\_\_\_%

GRAND TOTAL: DVBE \_\_\_\_\_%

**PART B – ESTABLISHMENT OF GOOD FAITH EFFORT**

To establish that a Good Faith Effort has been made, the following statement must be true.

1. Contact was made with the Contract Officer, Administrative Office of the Courts to identify potential Disabled Veteran Business Enterprises as Subcontractors or suppliers, or both.

Date Contracted: \_\_\_\_\_ Person Contracted: \_\_\_\_\_

List the names of DVBE's identified from contact made with Contract Officer, Administrative Office of the Courts.

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BIDDER

2. List contacts made with personnel from other state and federal agencies, and with personnel from Disabled Veterans Business Enterprises to identify Disabled Veterans Business Enterprises.

<u>Source</u>	<u>Person Contracted</u>	<u>Date</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

List the Names of DVBEs identified from contact made with other state, federal, and local agencies.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Advertising was published in trade papers and papers focusing on Disabled Veterans Business Enterprises. (Attach proof of publication.)

<u>Publication</u>	<u>Date(s) Advertised</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attachment B

DVBE COMPLIANCE DOCUMENTATION AND CERTIFICATION OF PRIME BIDDER

INCOMPLETE DOCUMENTATION MAY RESULT IN DISQUALIFICATION FROM FURTHER PARTICIPATION IN SELECTION PROCESS FOR THIS CONTRACT.

4. Invitation to bid were submitted to potential Disabled Veterans Business Enterprise Contractors (list the company name, person contacted, and date) to be subcontractors or solicitation (i.e., letters, return receipt, metered envelopes, responses, etc.). Solicitation must be job specific to plan and/or contract.

<u>Company</u>	<u>Contact</u>	<u>Date Sent</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. List the available Disabled Veterans Business Enterprises which were considered as subcontractors or suppliers or both. (Complete each subject line.)

COMPANY: \_\_\_\_\_

CONTACT: \_\_\_\_\_ PHONE #: \_\_\_\_\_

NATURE OF WORK:  
\_\_\_\_\_

RESULT: \_\_\_\_\_

REASON WHY REJECTED: \_\_\_\_\_

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COMPANY: \_\_\_\_\_

CONTACT: \_\_\_\_\_ PHONE #: \_\_\_\_\_

NATURE OF WORK:  
\_\_\_\_\_

RESULT: \_\_\_\_\_

REASON WHY REJECTED: \_\_\_\_\_

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Attachment B  
DVBE COMPLIANCE DOCUMENTATION AND CERTIFICATION OF PRIME  
BIDDER

INCOMPLETE DOCUMENTATION MAY RESULT IN DISQUALIFICATION FROM  
FURTHER PARTICIPATION IN SELECTION PROCESS FOR THIS CONTRACT.

6. CERTIFICATION (to be completed by Bidder)

I hereby certify that I have made a diligent effort to ascertain the facts with regard to the representations made herein and, to the best of my knowledge and belief, each firm set forth in this bid as a Disabled Veterans Business Enterprise complies with the relevant definition set forth in Section 1896.61 of Title 2, and Section 999 of the Military and Veterans Code, California Code of Regulations. In making this certification, I am aware of Section 10115 et seq. Of the Government Code which establishes the following penalties certification for State Contracts:

Penalties for a person guilty of a first offense are a misdemeanor, civil penalty of \$5,000, and suspension from contracting with the State for a period of not less than 30 days nor more than one year.

Penalties for second and subsequent offenses are a misdemeanor, a civil penalty of \$20,000 and suspension from contracting with the State for up to three years.

IT IS MANDATORY THE FOLLOWING BE COMPLETED ENTIRELY; FAILURE TO DO SO WILL RESULT IN IMMEDIATE REJECTION.

\_\_\_\_\_  
Firm Name of Bidder

\_\_\_\_\_  
Address of Bidder

\_\_\_\_\_  
Telephone Number of Bidder

\_\_\_\_\_  
FAX

\_\_\_\_\_  
Signature of Chief Executive Officer of Bidder

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name (printed) of Chief Executive Officer of Bidder

\_\_\_\_\_  
Title of Above-Named Person

INCOMPLETE DOCUMENTATION MAY RESULT IN DISQUALIFICATION FROM  
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CONTRACT AMOUNT CERTIFICATION

I hereby certify that the "Contract Amount," as defined herein, is the amount of \$\_\_\_\_\_.  
I understand that the "Contract Amount" is the total dollar figure to which the DVBE participation requirements will be evaluated against.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Bidder's Signature