



Judicial Council of California
ADMINISTRATIVE OFFICE OF THE COURTS

FINANCE DIVISION

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TO: POTENTIAL PROPOSERS

**FROM: ADMINISTRATIVE OFFICE OF THE COURTS
EXECUTIVE OFFICE PROGRAMS DIVISION**

DATE: December 16, 2008

SUBJECT/PURPOSE OF MEMO: REQUEST FOR PROPOSALS (RFP)

Executive Office Programs, a division of the Administrative Office of the Courts, seeks the services of a program evaluation consultant (Contractor), who has expertise in observing program processes and reporting on their impact and where they might improve. The consultant should be familiar with how successful court- and/or community-based legal services programs are implemented. Additionally, knowledge of community service, current volunteer trends, and/or AmeriCorps programs will be beneficial to successfully completing the scope of work. The consultant will develop, implement, and report on an evaluation of the JusticeCorps program by observing the program and interviewing JusticeCorps and other court staff and gathering information from self represented litigants who have been served by the program.

ACTION REQUIRED: You are invited to review and respond to the attached Request for Proposal (RFP), as posted at <http://www.courtinfo.ca.gov/reference/rfp/>:

Project Title: **EVALUATION OF THE 2009 CALIFORNIA JUSTICECORPS PROGRAM**

RFP Number: EOP 13-08 JusticeCorps Evaluation-LM

QUESTIONS TO THE SOLICITATIONS MAILBOX: Questions regarding this RFP should be directed to solicitations@jud.ca.gov by **Thursday, January 8, 2009, no later than 3 p.m. (PST).**

DATE AND TIME PROPOSAL DUE: There will not be a pre-proposal conference for this RFP. Proposals must be received by **Thursday, January 15, 2009, no later than 3 p.m. (PST).**

SUBMISSION OF PROPOSAL: Proposals must be sent to:
**Judicial Council of California
Administrative Office of the Courts
Attn: Nadine McFadden, RFP No. EOP 13-08 JusticeCorps Evaluation-LM
455 Golden Gate Avenue, 7th Floor
San Francisco, CA 94102-3688**

JUDICIAL COUNCIL OF CALIFORNIA ADMINISTRATIVE OFFICE OF THE COURTS

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 BACKGROUND ON THE CALIFORNIA JUSTICECORPS PROGRAM

The California JusticeCorps program is a collaborative project of the California Administrative Office of the Courts, the 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 Universities; 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.

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 a \$1,000.00 education award that can be applied toward educational expenses as well as an invaluable opportunity to learn about the law outside of the classroom.

The JusticeCorps program aims to increase services to self-represented litigants in court based self-help centers, enhance the quality of that service and also 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.

Bidders for this RFP can learn more about the California JusticeCorps program at:
www.courtinfo.ca.gov/programs/justicecorps

Bidders for this RFP can learn about previous evaluations of the JusticeCorps program at:
<http://www.courtinfo.ca.gov/programs/equalaccess/documents/selfrep07/SHAssistance/FGExecSumm.pdf>

and at:

<http://www.courtinfo.ca.gov/programs/equalaccess/documents/selfrep07/SHAssistance/FGFullReport.pdf>

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

1.3 JUSTICECORPS PROGRAM EVALUATION COMPONENT

Currently, the JusticeCorps program does not compare its outputs to a control group of non-JusticeCorps courts. Throughout the program year, the program goals at participating sites are measured by: the number of students trained and placed in service for 300 or more hours during the course of an academic year; the number of self-represented litigants served; the number of instances of information and referral appropriately provided; and the number of court documents filed correctly. Current success rates are based on targets developed at the beginning of each program year

JusticeCorps has conducted a small-scale evaluation of the program in the form of convening and reporting on findings from focus groups of court users who were served in the Los Angeles program. A more thorough, independent evaluation is critical to the further development and replication of this program. An evaluation that goes beyond the outputs already measured to better assess the extent to which the program improves court processes and/or outcomes for individuals and families is key to identifying the most successful core elements of the program and how they contribute to positive results.

2.0 TIMELINE FOR THIS RFP

The AOC has developed the following list of key events from the time of the issuance of this RFP through the intent to award contract. All dates are subject to change at the discretion of the AOC.

EVENT	KEY DATE
RFP issued to http://www.courtinfo.ca.gov/reference/rfp/ :	Tuesday December 16, 2008
Deadline for questions to solicitations@jud.ca.gov	Thursday January 8, 2009 at 3:00 pm (PST)
Latest date and time proposal may be submitted	Thursday January 15, 2009 at 3:00 pm (PST)
Evaluation of proposals (<i>estimate only</i>)	January 19-22, 2009
Notice of Intent to Award (<i>estimate only</i>)	January 23, 2009
Negotiations and execution of contract (<i>estimate only</i>)	January 30, 2009

3.0 PURPOSE OF THIS REQUEST FOR PROPOSALS (RFP)

- 3.1 The purpose of this Request for Proposals is to secure a Contractor with expertise in: 1) program evaluation, 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; 2) identifying elements that lead to successfully implemented court based or community based legal services programs; and 3) experience with or knowledge of community service, current trends in volunteerism, and/or AmeriCorps programs and the services they deliver.
- 3.2 Services are expected to be performed by the Contractor between **February 1, 2009** and **October 31, 2009**.
- 3.3 The overarching evaluation question is the following: *What impact do JusticeCorps members have on self-represented litigants’ ability to move forward with and eventually resolve their legal matters?* While user feedback—for example, exit surveys—can yield useful information about the extent to which litigants were helped by JusticeCorps members, past experience shows that surveys such as these are generally all positive and appreciative.
- 3.4 The AOC seeks a Contractor to help ask more 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. The research questions may likely fall into two categories: a set of questions that will elicit a statistically-based assessment (such as Questions 1 through 4 below); and questions that will provide a deeper assessment of what we may already know about the program’s impact on the personal lives and perceptions of self-represented litigants (such as Questions 5 through 7).

3.4.1 Research questions to be investigated may include, but are not limited to, the following:

3.4.1.1 Do court based self-help centers that utilize JusticeCorps members serve more people than those centers that do not? If so, how many?

3.4.1.2 Do court based self-help centers that utilize JusticeCorps members have a higher instance of making appropriate referrals to associated services than those centers that do not? If so, how many?

3.4.1.3 Do court based self-help centers that utilize JusticeCorps members have a higher instance of legal forms filled out correctly than those centers that do not? If so, how many more forms are completed correctly?

3.4.1.4 Are the full time JusticeCorps case management fellows serving in Los Angeles helping to resolve more pending dissolution cases than would otherwise be resolved without those particular members' help? If so, how many additional cases are being resolved?

3.4.1.5 Do court users assisted by JusticeCorps members and a self-help center attorney (attorneys ultimately review all JusticeCorps members' work) have more favorable comments about the usefulness of the services they received than those helped by only an attorney?

3.4.1.6 Are there positive impacts – to the court, the community, the individual – associated with forward progress and resolution of a pending legal matter? If so what are they?

3.4.1.7 What are the efficiencies of the JusticeCorps program? Does the JusticeCorps program provide cost, staff time, or other savings to the court?

3.5 In addition to the above evaluation, the Contractor will be asked to assist the AOC in the development of evaluation tools for program staff and partners to use in ongoing self-assessment.

4.0 RFP ATTACHMENTS

4.1 Included as part of this RFP are the following attachments:

4.1.1 Attachment 1 - Administrative Rules Governing Request for Proposals. Proposers shall follow the rules, set forth in *Attachment 1, in preparation and submittal of their proposals.*

4.1.2 Attachment 2 - Contract Terms. 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. Terms and conditions typical for the requested services are attached as *Attachment 2 - Contract Terms* and include: *Exhibits A through E*.

4.1.3 Attachment 3 - Vendor's Acceptance of the RFP's Contract Terms. Proposers must either indicate acceptance of Contract Terms, as set forth in *Attachment 2 – Contract Terms*, or clearly identify exceptions to the Contract Terms, as set forth in this *Attachment 3*.

4.1.3.1 If exceptions are identified, then proposers must also submit (i) a red-lined version of *Attachment 2 – Contract Terms*, that clearly tracks proposed changes to this attachment, and (ii) written documentation to substantiate each such proposed change.

4.1.4 Attachment 4 - Payee Data Record Form. The AOC is required to obtain and keep on file, a completed Payee Data Record for each vendor prior to entering into a contract with that vendor. Therefore, vendor's proposal must include a completed and signed *Payee Data Record Form, set forth as Attachment 4*.

5.0 EVALUATION OF PROPOSALS

Proposals will be evaluated by the AOC using the following criteria, in order of descending priority:

- a. Quality of work plan submitted, including methodology to complete the work
- b. Experience on similar assignments, with an emphasis on experience evaluating use of the same program model in different environments.
- c. Reasonableness of cost projections
- d. Credentials of staff to be assigned to the project
- e. Ability to meet timing requirements to complete the project

6.0 SPECIFICS OF A RESPONSIVE TECHNICAL PROPOSAL

The following information shall be included as the technical portion of the proposal:

6.1 Quality of work plan submitted.

6.1.1 Approach:

6.1.1.1 Proposed project and organization. Include plan for developing research questions.

6.1.1.2 Proposed methodology. Include plan for gathering input from participating JusticeCorps courts (in Los Angeles, the Bay Area, and San Diego), from a select number of other courts who do not

utilize the program, and from court users who have been served by the program.

6.1.1.3 Proposed methods for working with courts to research the program's efficiencies and impacts, identify where improvements may be made, and recording these interactions. and reporting on those findings.

6.1.1.4 Proposed methods for outreach to, discussion with, and recording the impressions of self represented litigants who have been served by the program.

6.1.1.5 Proposed method for analyzing data and presenting findings.

6.1.2 Contact information. Provide proposer's point of contact, including name, physical and electronic addresses, and telephone and facsimile numbers.

6.1.3 Tax recording information. Complete and submit *Attachment 4 - Payee Data Record Form*. Note that if an individual or sole proprietorship, using a social security number for tax recording purposes, is awarded a contract, the social security number will be required prior to finalizing a contract.

6.1.4 Compliance with Contract Terms. Complete and submit *Attachment 3 - Vendor's Acceptance of the RFP's Contract Terms*. If changes to *Attachment 2* are proposed, submit red-lined version of *Attachment 2 - Contract Terms* as well as written justification supporting any such proposed changes.

6.2 Experience on similar assignments, with an emphasis on experience evaluating use of the same program model in different environments.

6.2.1 Provide the names, physical and electronic addresses, and telephone numbers of a minimum of (3) clients for whom the proposer has conducted similar services. The AOC may check references listed by the proposer.

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

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

6.3 Reasonableness of cost projections. See below, *RFP: 7.0 Specifics of a Responsive Cost Proposal*.

6.4 Credentials of staff to be assigned to the Project. Describe key staff's knowledge of the requirements necessary to complete this project. Provide professional qualifications and experience of key staff, as well as each individual's ability and experience in

conducting the proposed activities. Submit hardcopy of key staff's information in proposal as well as electronically. (*See RFP: 8.0 Submissions of Proposals*)

- 6.5 Ability to meet timing requirements to complete the Project. Overall plan must include time estimates for completion of all work required.

7.0 SPECIFICS OF A RESPONSIVE COST PROPOSAL

The following information shall be included as the cost portion of the proposal:

7.1 Reasonableness of Cost Projections.

7.1.1 As a separate document, submit a detailed line item budget showing total cost of the services for each of the seven (7) Deliverables specified in *Attachment 2 Contract Terms, Exhibit D - Work to be Performed*. This budget should identify unique hourly rates, titles, and responsibilities for each "Key Personnel," but can group this information for other personnel in a more general manner. Staff rates should be fully burdened, including indirect costs, overhead and profit. The cost proposal should also include separate line items for postage/ mailing costs and travel and lodging. Fully explain and justify all budget line items in a narrative entitled "Budget Justification."

7.1.2 The total cost for Contractor services will range between \$40,000.00 - \$50,000.00, inclusive of personnel, materials, overhead rates, travel and profit. The method of payment to the Contractor will be by cost reimbursement for each of the seven (7) Deliverables specified in *Attachment 2 Contract Terms, Exhibit D - Work to be Performed*.

8.0 SUBMISSIONS OF PROPOSALS

8.1 Responsive proposals should provide straightforward, concise information that satisfies the requirements noted in items *RFP: 6.0 Specifics of a Responsive Technical Proposal* and *RFP: 7.0 Specifics of a Responsive Cost Proposal*, 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.

8.2 Proposers will submit one (1) original and one (1) copy of the technical proposal and cost proposal signed by an authorized representative of the company, including name, title, address, and telephone number of one individual who is the responder's designated representative. Proposers are also required to submit an electronic version of the entire proposal on CD-ROM.

8.3 Proposals must be delivered to the individual listed under Submission of Proposals, as set forth on the cover memo of this RFP.

8.4 Only written responses will be accepted. Responses should be sent by registered or certified mail or by hand delivery.

9.0 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.

10.0 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.

11.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

The Administrative Office of the Courts policy is to follow the intent of the California Public Records Act (PRA). If a vendor's proposal contains material noted or marked as confidential and/or proprietary that, in the AOC's sole opinion, meets the disclosure exemption requirements of the PRA, then that information will not be disclosed pursuant to a request for public documents. If the AOC does not consider such material to be exempt from disclosure under the PRA, the material will be made available to the public, regardless of the notation or markings. If a vendor is unsure if its confidential and/or proprietary material meets the disclosure exemption requirements of the PRA, then it should not include such information in its proposal.

END OF FORM