



**Judicial Council of California**  
ADMINISTRATIVE OFFICE OF THE COURTS

FINANCE DIVISION

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**TO: POTENTIAL PROPOSERS**

**FROM: ADMINISTRATIVE OFFICE OF THE COURTS  
FINANCE DIVISION**

**DATE: October 5, 2009**

**SUBJECT/PURPOSE OF MEMO: REQUEST FOR PROPOSALS**

The Administrative Office of the Courts seeks the services of one (1) consultant with expertise in the evaluation of child support guidelines to conduct the research for the quadrennial *Review of Statewide Uniform Child Support Guideline*. In addition, the consultant will write a report and provide coordination and technical assistance during the study period.

**ACTION REQUIRED:** You are invited to review and respond to the attached Request for Proposal (RFP),  
**Project Title: REVIEW OF STATEWIDE UNIFORM CHILD SUPPORT GUIDELINE**  
**RFP Number: CFCC 15-09-LM**

**QUESTIONS TO THE SOLICITATIONS MAILBOX:** Questions regarding this RFP should be directed to [Solicitations@jud.ca.gov](mailto:Solicitations@jud.ca.gov) by **October 12, 2009, at close of business.**

**DATE AND TIME PROPOSAL DUE:** There will not be a pre-proposal conference for this RFP.

Proposals must be received by **October 19, 2009, at close of business.**  
Proposals must be sent to:  
**Judicial Council of California**  
**Administrative Office of the Courts**  
**Attn: Nadine McFadden, RFP No. CFCC 15-09-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 CENTER FOR FAMILIES, CHILDREN & THE COURTS**

The Center for Families, Children & the Courts (CFCC), a division of the AOC, will coordinate this project. The CFCC focuses on juvenile and family projects that improve the lives of children through positive changes in the trial and appellate courts' handling of matters involving children. The Child Support Commissioner and Family Law Facilitator Program (Assembly Bill 1058) is a mandated statewide program to expedite child support cases. The Judicial Council administers it by adopting rules and forms, setting standards for the Office of the Family Law Facilitator, overseeing budget administration, and in other ways ensuring successful implementation of the program. A cooperative agreement, number 10-0264-09, between the Department of Child Support Services (DCSS) and the Judicial Council provides for two-thirds funding originating from the federal government and Trial Court Improvement Funds provide the one-third state match needed to conduct the quadrennial review. The Child Support Commissioner and Family Law Facilitator Program is charged with the oversight of the Judicial Council's review of California's statewide uniform child support guideline.

1.2.1 The fact sheet for the Child Support Commissioner and Family Law Facilitator Program (Assembly Bill 1058) is located at:

[www.courtinfo.ca.gov/reference/documents/factsheets/Child\\_Support.pdf](http://www.courtinfo.ca.gov/reference/documents/factsheets/Child_Support.pdf)

The fact sheet for CFCC is located at:

[www.courtinfo.ca.gov/reference/documents/factsheets/cfcc.pdf](http://www.courtinfo.ca.gov/reference/documents/factsheets/cfcc.pdf)

CFCC's web site is located at: [www.courtinfo.ca.gov/programs/cfcc/programs](http://www.courtinfo.ca.gov/programs/cfcc/programs).

**1.3 REVIEW OF STATEWIDE UNIFORM CHILD SUPPORT GUIDELINE**

1.3.1 California has adopted a child support guideline in compliance with federal law, 42

U.S.C. section 667(a). California Family Code, section 4054(a) provides that the “Judicial Council shall periodically review the statewide uniform guideline to recommend to the Legislature appropriate revisions.” California’s guideline is found at Family Code sections 4050–4076. Federal law also requires that child support guidelines be reviewed by the state at least once every four years to “ensure that their application results in the determination of appropriate child support award amounts,” as promulgated by 42 U.S.C. section 667(a).

## 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
Issue date of RFP	October 5, 2009
Deadline for questions to <a href="mailto:Solicitations@jud.ca.gov">Solicitations@jud.ca.gov</a>	October 12, 2009 at close of business
Latest date and time proposal may be submitted	October 19, 2009 at close of business
Evaluation of proposals ( <i>estimate only</i> )	October 22-26, 2009
Notice of Intent to Award ( <i>estimate only</i> )	October 30, 2009
Negotiations and execution of contract ( <i>estimate only</i> )	November 6, 2009

## 3.0 PURPOSE OF THIS REQUEST FOR PROPOSALS (RFP)

- 3.1 The purpose of this Request for Proposals is to secure a contract to provide the services of a consultant with expertise in the evaluation of child support guidelines.
- 3.2 The expected contractual responsibilities and work requirements are set forth in *Exhibit D, Work to be Performed* for a period of twenty-five (25) weeks. The final report, Deliverable 8, would be due at the end of week seventeen (17).

## 4.0 RFP ATTACHMENTS

Included as part of this RFP are the following attachments:

- 4.1. 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.

- 4.2 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* and include *Exhibits A through F*.
- 4.3 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*, or clearly identify exceptions to the Contract Terms, as set forth in this *Attachment 3*.
  - 4.3.1 If exceptions are identified, then proposers must also submit (i) a redlined version of *Attachment 2*, that clearly tracks proposed changes to this Attachment, and (ii) written documentation to substantiate each such proposed change.
  - 4.3.2 Prospective service providers may include exceptions to the *Attachment 2*, in their proposal submission. However, the AOC, at its sole discretion, will determine whether such submitted exceptions are significant or minor. Proposals that contain significant exceptions may be deemed non-responsive by the AOC, at the AOC's sole discretion, to the requirements of this RFP and may be rejected without further evaluation.
- 4.4 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. Each proposed candidate will be evaluated separately in accordance with these criteria:

- 5.1 *Quality of work plan submitted. (30 Total Possible Points)*. Proposals will be evaluated considering the type of services required and the complexity of the project, with special consideration as listed in paragraph 6.1, below.
- 5.2 *Credentials of key personnel to be assigned to project. (20 Total Possible Points)*. Proposals will be evaluated considering skills sets and their accomplished degrees, with special consideration as listed in paragraph 6.2, below.
- 5.3 *Experience of key personnel working on similar assignments. (20 Total Possible Points)*. Proposals will be evaluated considering demonstrated experience with past performance, especially on child support guideline evaluations, including such factors as principals, policies and program implementation, ability to meet schedules,

cooperation, responsiveness, with special consideration as listed in paragraph 6.3, below.

- 5.4 *Ability to meet timing requirements to complete the Work. (15 Total Possible Points).* Proposals will be evaluated in terms of compliance with proposed contract terms and project scheduling, as demonstrated in 6.4, below.
- 5.5 *Reasonableness of cost projections. (10 Total Possible Points).* Proposals will be evaluated in terms of reasonableness of cost, proposed rate structure for the position, including breakdown of salary, overhead and profit, as demonstrated in 6.5, below.
- 5.6 *Company Stability and Capabilities. (5 Total Possible Points).* Proposals will be evaluated in terms of the agency's stability and capabilities as demonstrated in 6.6, below.

## **6.0 SPECIFICS OF A RESPONSIVE TECHNICAL PROPOSAL**

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.

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 process necessary to address the overall project objectives;
- 6.1.1.2 Proposed method to conduct and manage the project's various literature reviews, including proposed data sources and approach to analyzing and synthesizing findings;
- 6.1.1.3 Proposed research methodology for the case file review including sampling strategy, data management procedures, data security and data verification procedures, and approach to analysis and synthesis of results;
- 6.1.1.4 Proposed method to conduct and organize focus groups, including participant recruitment strategy and development of discussion questions;
- 6.1.1.5 Proposed project and team organization; and

6.1.1.6 Proposed approach of obtaining Project Manager's review and approval of all research design elements and deliverables developed for the project.

6.2. *Credentials of key personnel to be assigned to project.*

6.2.1 Proposer has demonstrated experience with similar child support guideline evaluations and/or professional research skills in evaluating large data sets involving social policy in its implementation through the legal system;

6.2.2 Proposer is familiar with quantitative and qualitative research design and analysis; and

6.2.3 Proposer has demonstrated knowledge and understanding of child support guideline principles, policies, and program implementation.

6.3 *Experience of key personnel working on similar assignments.*

6.3.1 Experience of key personnel in each of the following areas:

6.3.1.1 Proposer's key personnel has demonstrated experience with research design, quantitative analysis, conducting focus groups, and preparing literature reviews;

6.3.1.2 Proposer's key personnel has demonstrated experience using Statistical Package for the Social Sciences (SPSS) for quantitative data analysis, coding data, and displaying data in graphical form;

6.3.1.3 Proposer's key personnel have demonstrated knowledge and understanding of social policy analysis; and

6.3.1.4 Proposer has demonstrated an ability to work collaboratively with an administrative policymaking agency in analyzing data, program evaluation, and developing draft policy and/or legislative recommendations.

6.3.2 Provide the most recent resume and the names, physical and electronic addresses, and telephone numbers of a minimum of three (3) clients for whom the proposed key personnel has conducted similar services. The AOC may check references listed by the proposer.

6.4 *Ability to meet timing requirements to complete the Work.*

6.4.1 Plan must include time estimates for completion of all work required; and

6.4.2 Discuss the key personnel's availability and ability to complete the work

within the project schedule, set forth in *Exhibit D, Work to be Performed*.

6.4.3 Compliance with Contract Terms. Complete and submit Attachment 3, *Vendor's Acceptance of the RFP's Contract Terms*. Also, if changes are proposed, submit a version of *Attachment 2* with all tracked changes, as well as written justification supporting any such proposed changes.

6.5 *Reasonableness of cost projections.*

6.5.1 See below, *RFP: 7.0 Specifics of a Responsive Cost Proposal*.

6.6 *Company Stability and Capabilities.* Provide the following information about your company:

6.6.1 Proposer's point of contact, including name, physical and electronic addresses, and telephone and facsimile numbers in a cover letter.

6.6.2 Number of years your company has been in the business of research consultation.

6.6.3 Number of full time employees.

6.6.4 Disclose any judgments, pending litigation, or other real or potential financial reversals that might materially affect the viability of the proposer's company.

6.6.5 Annual gross revenue from your most recent audited or reviewed profit and loss statement and balance sheet. State the audit/review year and the annual gross revenue. The AOC may request a copy of your most recent audited or reviewed profit and loss statement and balance sheet.

6.6.6 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.

## **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 nine (9) 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," plus rates for any additional staff, 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.” Travel expenses, if any, will be reimbursed in accordance with the provisions set forth in *Exhibit C, Payment Provisions, in Attachment 2, Contract Terms.*

7.1.2 The total cost for consultant services will range between **\$150,000.00 to \$198,500.00**, inclusive of personnel, materials, overhead rates, travel and profit. The method of payment to the consultant will be by cost reimbursement for each of the nine (9) Deliverables specified in *Attachment 2 Contract Terms, Exhibit D - Work to be Performed.*

## **8.0 SUBMISSIONS OF PROPOSALS**

- 8.1 The proposer shall provide their point of contact, including name, physical and electronic addresses, and telephone and facsimile numbers in a cover letter.
- 8.2 Responsive proposals should provide straightforward, concise information that satisfies the requirements noted in items *RFP: 6.0 Specifics of a Responsive Technical 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 three (3) copies** of the technical proposal signed by an authorized representative of the company, including name, title, address, and telephone number of one individual who is the proposer’s designated representative. The most recent resume should be in MS Word format. 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***

