



Judicial Council of California
ADMINISTRATIVE OFFICE OF THE COURTS

FINANCE DIVISION

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TO: **POTENTIAL PROPOSERS**

FROM: Administrative Office of the Courts
Center for Families, Children & the Courts Division

DATE: **May 2, 2008**

SUBJECT/PURPOSE OF MEMO: **REQUEST FOR PROPOSALS**
The Center for Families, Children & the Courts (CFCC), a division of the Administrative Office of the Courts, seeks to a consultant with extensive supervised visitation expertise and familiarity with court operations and procedures to (a) develop a draft version of a policy and procedure manual for the operation and administration of supervised visitation services based on Standard 5.20 of the California Standards of Judicial Administration; (b) write a study guide on documentation and court report writing and create a companion form template to be used by California Access to Visitation Grant recipients; and, (c) research potential funding sources and write a grant application for supportive visitation services. It is anticipated, subject to the availability of federal funding, there will be two (2) terms to this project.

ACTION REQUIRED: You are invited to review and respond to the attached Request for Proposals (RFP), as posted at <http://www.courtinfo.ca.gov/reference/rfp/>:
Project Title: Development of a Draft Policies and Procedures Manual For Standard 5.20 of the California Standards Of Judicial Administration and
Development of a Grant Application for Supportive Visitation Services
RFP Number: CFCC 05-08 Access to Visitation Consultant-LM

QUESTIONS TO THE SOLICITATIONS MAILBOX: Questions regarding this RFP should be directed to solicitations@jud.ca.gov by **Monday, May 12, 2008, 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 **Tuesday, May 20, 2008, 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. CFCC 05-08 AV Consultant-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

1.1.1 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 THE CENTER FOR FAMILIES, CHILDREN & THE COURTS

1.2.1 The Center for Families, Children & the Courts, a division of the AOC, is dedicated to improving the quality of justice and services to meet the diverse needs of children, youth, families, and self-represented litigants in the California courts. Through a multidisciplinary approach, CFCC seeks to ensure that the well-being of children, youth, and families is a high priority within the California judicial system and provides leadership, outreach, and collaboration to ensure that court and community resources are available. To this end, CFCC is committed to assisting the courts in the development of best practices to manage ever increasing caseloads and provide timely, effective services to California families.

1.3 CALIFORNIA ACCESS TO VISITATION GRANT PROGRAM

1.3.1 The Judicial Council is charged with administering and distributing California's share of the federal Child Access and Visitation Grant funds from the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Child Support Enforcement. These grants, established under section 391 of the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (Pub.L. 104-193, 110 Stat. 2258)—title III, section 469B of the Social Security Act—enable states to establish and administer programs that support and facilitate noncustodial parents' access to and visitation with their children. The congressional goal of the Child Access and Visitation Grant Program is to "remove barriers and increase opportunities for biological parents who are not living in the same household as their children to become more

involved in their children lives.” State funding allocations under the discretionary formula grant are based on a formula: the number of single-parent households.

1.3.2 Under the federal statute, Child Access and Visitation Grant funds may be used to support and facilitate noncustodial parents’ access to and visitation [with] their children by means of activities including mediation (both voluntary and mandatory), counseling, education, development of parenting plans, visitation enforcement (including monitoring, supervision and neutral drop-off and pick-up), and development of guidelines for visitation and alternative custody arrangements. The use of the funds in California, however, is limited by state statute to three (3) types of programs:

- Supervised visitation and exchange services;
- Education about protecting children during family disruption; and
- Group counseling services for parents and children.

1.4 ACCESS TO VISITATION GRANT PROGRAM PROJECTS

1.4.1 This RFP encompasses two AOC Access to Visitation Grant Program Projects: (1) Development of a Draft Policies and Procedures Manual for Standard 5.20 (this will include a Documentation Study Guide and Form Template); and (2) Development of a Grant Application for Supportive Visitation Services. The AOC is seeking a consultant with extensive supervised visitation expertise (i.e., direct hands-on provider experience) and familiarity with court operations and procedures to develop a draft version of a policy and procedure manual for the operation and administration of supervised visitation services based on Standard 5.20 of the California Standards of Judicial Administration. As part of the manual deliverable, the consultant will write a study guide on documentation and court report writing and create a companion form template to be used by California Access to Visitation Grant recipients. Additionally, the consultant will research potential funding sources and write a grant application for supportive visitation services.

2.0 TIMELINE FOR THIS RFP

2.1 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/ :	May 2, 2008
Deadline for questions to solicitations@jud.ca.gov	Monday, May 12, 2008
Latest date and time proposal may be submitted	Tuesday, May 20, 2008
Evaluation of proposals (<i>estimate only</i>)	Wednesday, May 21, 2008 through Friday, May 23, 2008
Notice of Intent to Award (<i>estimate only</i>)	Friday, May 23, 2008
Negotiations and execution of contract (<i>estimate only</i>)	Friday, May 30, 2008

3.0 PURPOSE OF THIS REQUEST FOR PROPOSALS (RFP)

- 3.1 The AOC seeks the services of a consultant with extensive expertise in the field of practice of supervised visitation and knowledge of court operations and procedures relative to family law proceedings, in order to develop and produce a draft manual regarding Standard 5.20 of the California Standards of Judicial Administration (Uniform Standards of Practice for Providers of Supervised Visitation).
- 3.2 The purpose of the manual is to provide a statewide framework of model guidelines based on recommended best practices for implementation of Standard 5.20. The manual will include a variety of strategies and sample tools to assist new Access to Visitation Grant recipients and other courts seeking to promote high quality service delivery. It will also serve as a valuable resource for developing educational courses and technical assistance trainings.
- 3.3 Additionally, the consultant will develop a documentation study guide that will contain instruction guidance and education regarding documentation of a visitation session for court-ordered supervised visitation. The guide will also include information about the relevancy of documentation and visitation provider's report to the court, the importance of documentation—what should be documented and how to document in accordance with Standard 5.20, why document, and when to document. A companion documentation template will be created to ensure statewide uniformity and consistency by Access to Visitation grant recipients.
- 3.4 Furthermore, the AOC seeks the services of a consultant with supervised visitation expertise and experience in program development and planning in order to write an AOC grant application to secure supplemental funding for implementation of a new supervised visitation

model of service delivery to be administered under the Access to Visitation Grant Program—supportive visitation. The RFP is the process for a prospective consultant to submit their interest and qualifications to the AOC.

- 3.5 The services are expected to be performed by the selected service provider between the date of the execution of the contract through **September 30, 2008 (“Initial Term”)** with one (1) possible consecutive one-year option terms, to extend the agreement under the same terms and conditions in effect for the Initial Term, not to exceed a total contract period of two (2) years. The option term is defined as **First Option Term: October 1, 2008 through May 30, 2009.**
- 3.5.1 **Initial Term:** Project direction and outline drafting and revision and grant writing; and
- 3.5.2 **First Option Term:** Chapter drafting and revision and grant proposal submission. Subject to the availability of federal funding and exercised at the discretion of the AOC.
- 3.6 In order for the AOC to comply with Judicial Council of California’s fiscal year accounting and funding requirements, only Initial Term will be funded in the contract resulting from this RFP. First Option Term of this project will be set forth as optional to that contract.
- 3.7 Bidders for the RFP should be familiar with the following documents:
- 3.7.1 *2008 California Rules, of Court, Standard 5.20. Uniform Standards of Practice for Providers of Supervised Visitation*
http://www.courtinfo.ca.gov/rules/index.cfm?title=standards&linkid=standard5_20
- 3.7.2 *Referrals to Supervised Visitation: A Manual for Florida Judges (Florida Clearinghouse on Supervised Visitation)* <http://familyvio.csw.fsu.edu/IJ/RSV.php>

4.0 SCOPE OF SERVICES

- 4.1. **TIMEFRAME:** Services are expected to be performed by the selected consultant in two (2) terms, subject to the availability of federal funding, between the date of the execution of the contract and **May 30, 2009.**
- 4.2. **THE CONSULTANT WILL BE ASKED TO PROVIDE:**
- 4.2.1 **Initial Term**
- 4.2.1.1 **Deliverable 1 – June 30, 2008:**
- Provide a written summary of approach to surveying and identifying best practices used in California and other states for the delivery of supervised visitation services.

- Provide a report to AOC on data gathering findings, timetable and methodology for completion of the draft manual and documentation study guide.
- Research potential grants and provide a draft outline or provide a list of potential funding sources. The outline/list should include a description of how the concept of supportive visitation services fits within the particular funder grant application framework.

4.2.1.2 Deliverable 2 – July 31, 2008:

- Provide a first draft of the manual, documentation study guide, and documentation form template for AOC review and input.
- Provide a sample grant application narrative for (a) needs statement and (b) project methodology (this should include a clear description of the problem statement and project scope and activities).

4.2.1.3 Deliverable 3 – September 8, 2008:

- Refine a manual and documentation study guide based on the AOC program manager critique and feedback and provide second draft versions (the manual and study guide must be edited to the satisfaction of the AOC and comply with the AOC Style Guide).

4.2.1.4 Deliverable 4 – September 29, 2008:

- Edit and provide a final version of the draft policies and procedures manual (the manual must comply with the AOC Style Guide).
- Edit and provide a final documentation study guide and form template (the study guide must comply with the AOC Style Guide).
- Provide a final version of the grant application. This should contain the following: (a) project need statement, (b) project justification (rationale), (c) project goals and objectives, (d) proposed outcomes, (e) project sustainability plan, (f) project implementation tasks/timeline with milestones, and (g) an evaluation plan (the grant application must comply with the AOC Style Guide).

4.2.2 First Option Term

4.2.2.1 Deliverable 1 – October 30, 2008:

- Attend and participate in Access to Visitation Grant Program Strategic Planning Meeting and Roundtable in California as a workshop facilitator and faculty speaker. The meeting is anticipated to occur in October 2008 (TBD).
- Provide a written summary report to AOC on key concepts and statewide issues resulting from Strategic Planning and Roundtable Meeting.

4.2.2.2 Deliverable 2 – November 2008 through May 30, 2009:

- In consultation with the Access to Visitation Grant Program, prepare, revise, and assist with submission of several grant applications proposal for funding (source of funding and deadline dates will be dictated by due dates on grant application; however, consultant is to be available to assist AOC staff with application drafting and submission).

4.2.2.3 Deliverable 3 –January 30, 2009:

- As a result of consultation with the Access to Visitation Grant Program Manager, provide a draft of comprehensive outlines of the manual and revisions to the study guide for AOC staff and advisory committee review.

4.2.2.4 Deliverable 4 – March 30, 2009:

- Submit revised chapter outlines and study guide, (including revised form template) in response to comments from AOC staff and advisory bodies.

4.2.2.5 Deliverable 5 – May 20, 2009:

- Edit and provide a final version of the policies and procedures manual (the manual must comply with the AOC Style Guide).
- Edit and provide a final documentation study guide and form template (the study guide must comply with the AOC Style Guide).

5.0 RFP ATTACHMENTS

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

5.1.1 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.

5.1.2 Attachment 2 - 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*.

6.0 EVALUATION OF PROPOSALS

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

6.1.1 Knowledge of supervised visitation services and family law court operations and

procedures.

- 6.1.2 Experience on similar types of projects, including training and curriculum writing and development and experience with grant writing.
- 6.1.3 Sample of prior work. Provide at least two samples of work products related to the practice and operation of supervised visitation, curriculum development, and/or grant proposal writing.
- 6.1.4 Quality of work plan submitted.
- 6.1.5 Ability to meet timing requirements to complete the Project.
- 6.1.6 Reasonableness of cost projections.

7.0 SPECIFICS OF A RESPONSIVE TECHNICAL PROPOSAL

- 7.1 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
- 7.2 The following information shall be included as the technical portion of the proposal:
 - 7.2.1 Knowledge of supervised visitation services and family law court operations and procedures.
 - 7.2.1.1 Proposer must describe in detail key staff or the individual's knowledge and comprehensive understanding of supervised visitation in family law. This should include but is not limited to general familiarity of duties and obligations of professional providers, best practice guidelines, how supervised visitation operates in family court and the community, and related practice and administration issues.
 - 7.2.2 Experience on similar types of projects, including training and curriculum writing and development and experience with grant writing.
 - 7.2.2.1 Provide the names, physical and electronic addresses, and telephone number of at least two (2) references from clients for whom the proposer has conducted similar services or who can attest to the ability of key staff/individual to provide the required services.
(Note: The references cannot be from the same clients or agency.)
 - 7.2.2.2 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)

7.2.3 Sample of prior work

7.2.3.1 Proposer should provide at least two samples of work products related to the field of practice of supervised visitation. This may include, but is not limited to the following: previous grant applications submitted for funding, curricula developed for professional trainings or continuing education programs, articles or reports published by the proposer, sample guidelines or policies and procedures developed by the proposer as staff to an agency, or as an independent contractor, or as a consultant, or sample forms developed by proposer.

7.2.3.2 Proposer should submit the samples electronically.

7.2.4 Quality of work plan submitted.

7.2.4.1 Proposer should provide a thorough, detailed, timely plan on the proposed methodology for obtaining, consolidating, and summarizing data information for the development of the draft manual and grant application.

7.2.4.2 Proposer should provide a timeline with proposed milestones to ensure completion of the project.

7.2.5 Ability to meet timing requirements to complete the Project. Overall plan with time estimates for completion of all work required.

7.2.6 Reasonableness of cost projections. See below, *RFP: 8.0 Specifics of a Responsive Cost Proposal*.

8.0 SPECIFICS OF A RESPONSIVE COST PROPOSAL

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

8.1.1 Reasonableness of Cost Projections.

8.1.1.1 As a separate document, submit a detailed line item budget showing total cost of the services for each of the four (4) Deliverables in the Initial Term and four (4) Deliverables in the First Option Term. This budget should identify hourly rates, titles, and responsibilities. Fully explain and justify all budget line items in a narrative entitled "Budget Justification."

8.1.1.2 The total cost for consultant services will range from ***\$10, 00.00*** to ***\$12,000.00*** for each term and shall include all labor expenses,

administrative, operating, and incidental expenses, and all travel expenses. The method of payment to the consultant will be by cost reimbursement for each of the four (4) deliverables to be specified in the Initial Term and each of the four (4) Deliverables in the First Option Term.

9.0 SUBMISSIONS OF PROPOSALS

- 9.1 Responsive proposals should provide straightforward, concise information that satisfies the requirements noted in items *RFP: 7.0 Specifics of a Responsive Technical Proposal* and *RFP: 8.0 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.
- 9.2 Proposers will submit *one (1) original and two (2) copies* of the technical proposal and cost proposal signed by an authorized representative of the proposer, including name, title, address, and telephone number of one individual who is the responder's designated representative.
- 9.3 Proposals must be delivered to the individual listed under Submission of Proposals, as set forth on the cover memo of this RFP.
- 9.4 Only written responses will be accepted. Responses should be sent by registered or certified mail or by hand delivery.

10.0 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.

11.0 PROPOSED CONTRACT TERMS AND CONDITIONS

- 11.1 A contract with a successful service provider will be signed by the parties on a State of California Standard Agreement form and will include terms and conditions appropriate for this project. Generally, the terms and conditions of the contract shall include, but are not limited to:
 - Flow down requirements from federal grant;
 - Completion of the project within the timeframe provided;
 - No additional work authorized without prior approval;
 - No payment without prior approval;
 - Funding availability subject to the Legislature;

- Termination of contract under certain conditions;
- Indemnification of the State;
- Appropriate insurance requirements (minimum \$300,000.00);
- Approval by the State of any subcontractors;
- National Labor Relations Board;
- Drug-free workplace;
- Nondiscrimination/no harassment; and
- ADA requirements.

12.0 ADMINISTRATIVE RULES GOVERNING RFPs

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

13.0 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.

14.0 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.