



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, 2007

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 the services of a consultant to review, document, organize, and create a centralized archive of data files, questionnaires, and related publications from a longitudinal study of California family dispute resolution services.

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: SNAPSHOT STUDY ARCHIVING
RFP Number: CFCC 06-07 SNAPSHOT-LM

QUESTIONS TO THE SOLICITATIONS MAILBOX: Questions regarding this RFP should be directed to solicitations@jud.ca.gov by **Wednesday May 9, 2007, no later than 1 p.m. (PST)**.

DATE AND TIME PROPOSAL DUE: There will not be a pre-proposal conference for this RFP.
Proposals must be received by **Monday, May 14, 2007, no later than 1 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 06-07 Snapshot-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 (CFCC), a division of the AOC, provides a range of services to Courts in California, including research and technical assistance for juvenile and family courts, collaborative justice courts, cases involving self-represented litigants, and cases involving family violence.

1.3 THE SNAPSHOT STUDIES

Since 1991, CFCC, pursuant to Family Code § 1850, which mandates the collection of statewide statistics that advise family law policy, has been collecting detailed information from both parents and mediators involved in court-based child custody mediation through the Statewide Uniform Statistical Reporting System (SUSRS), also known as the “Snapshot studies.” The Snapshot studies have reported on the demographics, parenting concerns, domestic violence histories, attorney representation, and other characteristics of parents in court-based child-custody mediation. It has also reported on the court’s mediation process, including orders sought, issues raised during mediation sessions, and agreements reached. The Snapshot studies provide rigorous statistics on issues facing policymakers, judges, attorneys, court personnel, researchers, special interest groups, and parents who use the family courts.

The Snapshot studies consist of a network of discrete but interlocking studies containing representative data from more than 19,500 child custody cases. Data were collected in 1991, 1993, 1996, 1999, and 2003. The standard data collection for all cohorts includes a client profile, completed by parents prior to the mediation session; a parent viewpoint questionnaire, completed by parents after the mediation session; and a counselor report, completed by the mediator after the mediation session. Each cohort also included at least

one survey of family court services administrators. For some cohorts, additional data were collected. For the 1991 cohort, the study included a matched sample of uncontested child custody cases. Follow-up surveys were conducted with participants in the 1991 and 1993 studies. In 1996, users of parent education programs were surveyed, and in 2000, CFCC conducted a survey of adolescents and young adults subject to child custody and visitation orders. One cohort included assignment of a confidential identifier to each mediator, in order to match mediators to cases; this process also included completion of a survey on mediator demographics, background, and training. For more information on the Snapshot studies, see the CFCC Web site: <http://www.courtinfo.ca.gov/programs/cfcc/resources/publications/articles.htm#susrs>.

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, 2007
Deadline for questions to solicitations@jud.ca.gov	May 9, 2007 No later than 1 p.m.
Latest date and time proposal may be submitted	Monday, May 14, 2007 No later than 1 p.m.
Evaluation of proposals (<i>estimate only</i>)	May 14, 2007 through May 16, 2007
Notice of Intent to Award (<i>estimate only</i>)	May 16, 2007
Negotiations and execution of contract (<i>estimate only</i>)	June 2, 2007

3.0 PURPOSE OF THIS REQUEST FOR PROPOSALS (RFP)

- 3.1 The AOC seeks the services of a consultant with expertise in data management and statistical software (SAS and SPSS) to archive the Snapshot study data and related materials.
- 3.2 The purpose of this Request for Proposals (RFP) is to secure a contract to review, document, organize, and create a centralized archive of data files, questionnaires, and related publications from the Snapshot studies. The contractor's initial task will be to work with CFCC staff to create an inventory of all existing materials related to the Snapshot studies, including identifying the final analysis data sets for each survey. Next, the contractor will ensure that all data are in common file formats (e.g., text, SAS, or SPSS) and develop summary-level documentation, including the source questionnaire, formats, and a variable

guide. The contractor will then organize all materials into a central repository and index them with hyperlinks on an Excel spreadsheet or HTML page. As part of this effort, the contractor will also be responsible for identifying and destroying any personally identifying information that may still be linked with the data sets, as well as developing a list of materials that should potentially be purged from the archive. The contractor will be required to work onsite at the AOC office in San Francisco, due to confidentiality issues, for a major portion of the contract.

- 3.3 The Work of this RFP is provided in *Attachment 2 Contract Terms, Exhibit D - Work to be Performed*.

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:

- 5.1 Quality of work plan submitted.

- 5.2 Credentials of staff to be assigned to the Project, including experience with Access, SAS, SPSS, file conversion tools, and HTML.
- 5.3 Experience on similar assignments, particularly those involving management and documentation of large and/or longitudinal data sets.
- 5.4 Reasonableness of cost projections.
- 5.5 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 team organization.
 - 6.1.1.2 Proposed plan for creating common file formats (text, SAS, or SPSS) for data sets and related materials.
 - 6.1.1.3 Proposed method for organizing and storing all data sets and related materials.
 - 6.1.1.4 Proposed plan for protecting subject confidentiality, including identifying and destroying any personally identifying information that may still be linked to data sets.
 - 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 3* are proposed, then also submit red-lined version of *Attachment 3- Vendor's Acceptance of the RFP's Contract Terms* as well as written justification supporting any such proposed changes.
- 6.2 Credentials of staff to be assigned to the Project. Describe key staff's knowledge of the requirements necessary to complete this project, including experience with Access, SAS, SPSS, file conversion tools, and HTML. 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)

6.3 Experiences on similar assignments.

6.3.1 Provide the names, physical and electronic 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.

6.3.2 Proposal includes examples of other large-scale data management projects.

6.3.3 Proposer has demonstrated experience with statistical packages, including SPSS and SAS.

6.3.4 References are provided for similar types of prior work, including data management and archiving.

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

6.5 Ability to meet timing requirements to complete the Project. Overall plan with 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 four 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 travel and lodging, if applicable. Fully explain and justify all budget line items in a narrative entitled "Budget Justification."

7.1.2 The total cost for consultant services will range between \$15,000.00 and \$17,000.00, 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 four 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 three (3) copies 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.
- 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.
- 8.5 In addition to submittal of the original and three copies of the proposals, as set forth in items 8.2, above, proposers are also required to submit an electronic version of the entire proposal on CD-ROM.

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

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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.