

RFP Title: Court-Based Model Self-Help Network  
RFP Number: CFCC24-187RB

# REQUEST FOR PROPOSALS

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*JUDICIAL COUNCIL OF CALIFORNIA*

**REGARDING:**

RFP Title: Court-Based Model Self-Help Network  
RFP Number: CFCC24-187RB

**PROPOSALS DUE:**

December 30, 2024, NO LATER THAN 5:00 P.M. PACIFIC TIME

## 1.0 BACKGROUND INFORMATION

- 1.1 The Judicial Council of California, chaired by the Chief Justice of California, is the chief policymaking 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 Judicial Council of California is the staff agency for the council and assists both the council and its chair in performing their duties.
- 1.2 Within the Judicial Council's Center for Families, Children, and the Courts, the Model Self-Help Program is an ongoing annual funding allocation through the Budget Act. \$191,400 of the funding has been allocated to a project applying technology to self-help centers.
- 1.3 The Judicial Council recently approved a proposal to allocate this funding to a single Technology Model Project (Project) and directed staff to:
  - a) Require that the proposed Project be limited to enabling courts to collaborate in providing remote self-help services such as a telephone hotline, live chat, emails, or videoconferencing.
  - b) Award three-year grants through a competitive solicitation process open to all courts and conducted every three years; and
  - c) Make one grant award for the Project.<sup>1</sup>

## 2.0 DESCRIPTION OF SERVICES AND DELIVERABLES

### 2.1 Definitions

**Self-Help Centers:** Self-Help Centers provide legal information and resources to people without a lawyer. Assistance can be in person, over the phone, or online.

**Self-Represented Litigants:** A Self-Represented Litigant (SRL) is someone who

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<sup>1</sup> Judicial Council of Cal., Advisory Com. Rep., *Allocations and Reimbursements to Trial Courts: Model Self-Help Pilot Program Reallocation* (March 12,, 2021), <https://jcc.legistar.com/View.ashx?M=F&ID=9196655&GUID=E2F158DD-0583-43AF-A839-4C99C4105AF8>.

advocates for themselves in a legal case without the assistance of an attorney.

Remote Services: Remote services are services an organization provides a customer with assistance and instructions and that are conveyed remotely or virtually. These would include, but are not limited to:

- a) Telephone services,
- b) Email correspondence,
- c) Online workshops,
- d) Video conferencing,
- e) Virtual calendar management,
- f) Text reminders, and
- g) Live chats.

## 2.2 Services

The Judicial Council's Center for Families, Children, and the Courts (CFCC) seeks the services of a court to create and manage statewide remote self-help services for multiple participating courts (Project). The Project would include a telephone hotline, live chat, emails, videoconferencing, etc. that will be shared by many court locations. The managing court will provide:

- Self-help legal assistance to SRLs from participating courts during times and days agreed upon by the participating courts via remote means which can include phone, email, live chat, videoconferencing or other modalities.
- The network technology required to allow SRLs in participating courts access to remote assistance.
- Experienced self-help personnel to staff the network of participating courts and serve as legal assistants in complex areas of family law and other matters including the CARE Act, conservatorship, consumer debt, and eviction.
- Technology to allow the staff working on the Model Self-Help Network program to schedule appointments SRLs at a participating county's self-help center and send calendar reminders to them.
- Legally accurate scripts for self-help staff to utilize to provide uniform and consistent service to SRLs.
- Day-to-day oversight of operations of all the remote services.

## 2.3 Term of Awarded Agreement

It is the intention of the Judicial Council to award a single contract for a **36-month** period, estimated to begin **February 1, 2025**, through **January 31, 2028**, that will be renewed on an annual basis. The available fund for the services under this RFP

will be **\$191,400 per year**. Total award for the contract should not exceed \$571,200 but only a not to exceed amount of \$191,400 will be reimbursed per year. If cost supersedes the funds available in a particular year, then the remaining reimbursement will be paid out of the following year’s budget/contract.

Baseline Year 1: The Court will complete the Project no later than January 31, 2026.  
Option Year 1: The Court will complete the Project no later than January 31, 2027.  
Option Year 2: The Court will complete the Project no later than January 31, 2028.

2.4 Deliverables

Deliverable	Description	Estimated Completion Date
1.	<p>Develop and submit a Project plan and timeline to the Judicial Council’s project manager. Project plan will include all tasks to complete the project including:</p> <p>(1) How the awarded court will solicit courts to join the remote self-help services,</p> <p>(2) How the awarded court will prioritize and select courts who apply to join the network.</p> <p>(3) A proposed timeline of the training and onboarding of participating courts.</p> <p>(4) The estimated number of monthly customers/court users from participating courts the awarded court will be able to assist.</p> <p>(5) The estimated assignments and hours of staff the awarded court will dedicate to support the project.</p>	2/28/2025
2.	<p>Prepare and provide uniform scripts, web content, and other informational materials for participating courts to utilize. Provide a list of local resources for referral.</p>	02/28/2025

3.	Negotiate and execute all necessary documentation to formalize participation of such courts and provide Judicial Council with copies of agreements documenting such participation.	3/30/2025
4.	Launch network and provide an updated Project plan and timeline that identifies participating courts, estimated monthly customers, assignments of staff, and network technology in place.	3/30/2025
5.	Report Project metrics including (1) each customer and court’s location, (2) the case type each customer/court user is requesting assistance for, (3) any referrals to local services, and (4) a summary of questions that were unresolved.	10/31/2025
6.	Provide bi-annual Project progress report to Judicial Council staff that details implementation and maintenance efforts.	06/30/2025 12/31/2025 06/30/2026 13/31/2026 06/30/2027 12/31/2027

### 3.0 TIMELINE FOR THIS RFP

The Judicial Council has developed the following list of key events related to this RFP. All dates are subject to change at the discretion of the Judicial Council.

EVENT	DATE
RFP issued	December 17, 2024
Deadline for questions <a href="mailto:Solicitations@jud.ca.gov">Solicitations@jud.ca.gov</a>	December 20, 2024
Questions and answers posted	December 23, 2024
Latest date and time proposal may be submitted. <a href="mailto:solicitations@jud.ca.gov">solicitations@jud.ca.gov</a>	December 30, 2024, 5:00p.m.
Evaluation of proposals ( <i>estimate only</i> )	January 1 - 10, 2025

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EVENT	DATE
Notice of Intent to Award ( <i>estimate only</i> ) <a href="http://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a>	January 13, 2025
Negotiations and execution of contract ( <i>estimate only</i> )	January 13, 2025 – January 24, 2025
Contract start date ( <i>estimate only</i> )	February 1, 2025
Contract end date ( <i>estimate only</i> )	January 31, 2026

#### 4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (Non-IT Services)	These rules govern this solicitation.
Attachment 2: JBE Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must sign a JBE Standard Form agreement containing these terms and conditions (the “Terms and Conditions”).
Attachment 3: Proposer’s Acceptance of Terms and Conditions	On this form, the Proposer must indicate acceptance of the Terms and Conditions or, in the alternative, identify exceptions to the Terms and Conditions.
Attachment 4: General Certifications Form	The Proposer must complete the General Certifications Form and submit the completed form with its proposal.
Attachment 5: Darfur Contracting Act Certification	The Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.
Attachment 6: Payee Data Record Form <a href="https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf">https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf</a>	This form contains information the Judicial Council requires in order to process payments and must be submitted with the proposal.
Attachment 7: Payee Data Record Supplement (STD205) <a href="https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std205.pdf">https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std205.pdf</a>	This form is optional. This form is used to provide remittance address information if different than the mailing address on the STD 204 – Payee Data Record. Use this form to provide additional remittance addresses and additional Authorized Representatives of the Payee not identified on the STD 204.
Attachment 8: Unruh and FEHA Certification	The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification.

## 5.0 PAYMENT INFORMATION

- 5.1 Subject to the terms in Attachment 2, Appendix B Payment Provisions, payment will be made in the form of reimbursements of the awarded bidder's actual allowable expenditures reported for the period.
- 5.2 The total cost for the services delivered under this RFP shall include payroll and benefits, operating expenses, and travel expenses. Details of reimbursable expenses are covered in Attachment 2, Appendix B Payment Provisions.

## 6.0 SUBMISSIONS OF PROPOSALS

- 6.1 Proposals should provide straightforward, concise information that satisfies the requirements of the "Proposal Contents" section below. Emphasis should be placed on conformity to the RFP's instructions and requirements, and completeness and clarity of content.
- 6.2 The Proposer must submit its proposal in two parts, the technical proposal and the cost proposal.
  - a. **Technical Proposal:** The Proposer must submit their Technical Proposal as a **separate attachment** from the Cost Proposal in an email sent to: [Solicitations@jud.ca.gov](mailto:Solicitations@jud.ca.gov)
  - b. The Technical Proposal must be signed by an authorized representative of the Proposer. The Proposer must indicate the RFP title and number on the subject line of the submission email and ensure that the RFP title and number are on the Proposal attachments.
  - c. **Cost Proposal:** The Proposer must submit their cost proposal **as a separate attachment** from the Technical Proposal to an email sent to: [Solicitations@jud.ca.gov](mailto:Solicitations@jud.ca.gov)
  - d. The cost proposal must be signed by an authorized representative of the Proposer. The cost proposal may be submitted in the same email as the technical proposal above but should be a **separate**



**attachment from the Technical Proposal**, marked “COST PROPOSAL.” The Proposer must indicate the RFP title and number on the subject line of the submission email and ensure that the RFP title and number are on the proposal attachments.

- 6.3 Both the technical and cost proposals must be received prior to the due date and time, or the proposal will not be accepted. The timeliness/non-timeliness of submitted proposals will be determined based on the date and time the emails are received by the Judicial Council. Due to the potential for email transmission delays, which may cause late receipt and non-acceptance of proposals, it is recommended that Proposers email their proposals well in advance of the due date and time.
- 6.4 Late proposals will not be accepted. However, as necessary, the Council may request and receive clarification from Proposers after the submission of proposals.
- 6.5 The Council 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 or contract and does not create any obligation to form a contract. The Council and/or the State of California shall not be responsible for the cost of preparing a proposal. Submitted proposals may be retained for official files and may become a public record.

## **7.0 PROPOSAL CONTENTS**

- 7.1 Technical Proposal. The following information must be included in the technical proposal. A proposal lacking any of the following information may be deemed non-responsive.
  - a. The Proposer’s name, address, telephone and email address.
  - b. Name, title, address, telephone number, and email address of the individual who will act as the Proposer’s designated representative for purposes of this RFP.
  - c. Proposed method to complete the Project.

- i. Propose overall Project plan for implementation of remote services that could include, but are not limited to, a telephone hotline, live chat, video conferencing, email etc. Project plan should include:
  - (1) Identification of the remote services the managing court will manage and offer to participating courts and the estimated number of SRLs these services will assist.
  - (2) Plan to solicit courts to join and share uniform remote services to court users that also includes:
    - a. Estimated number of Proposer's staff that will be assigned to support and manage the services,
    - b. Clarification as to whether or not courts seeking to participate in the Project managed by Proposer will need to contribute staff support and if so, the number of staff and hours that would be expected from these courts,
    - c. Method the Proposer will use to review, prioritize, and select participating courts from applications,
  - (3) Plan for training and implementation efforts of these remote services to ensure consistent service is provided. Plan should include information on the development and maintenance of training materials and resources for staff to provide consistent service and the technological needs the managing court and participating courts will require.
  - (4) Describe the plan to collect data on remote services.
  - (5) Plan to develop materials like phone scripts and a list of local resources to provide consistent service to participating court users.
  - (6) Plan to manage the number of customers that will utilize the remote services. Remote services such as a telephone hotline, live chat, video conferencing, etc. may result in more customers attempting to utilize the service than the resources of the network can serve. The Proposer must identify the maximum number of SRLs these remote services will be able to support and the maximum number of courts that can join the network.

- (7) A proposed schedule of service hours and days for each remote service type; and
    - (8) Implementation schedule with milestone dates.
  - d. Acceptance of the Terms and Conditions.
    - i. On Attachment 3, the Proposer must check the appropriate box and sign the form. If the Proposer marks the second box, it must provide the required additional materials. An “exception” includes any addition, deletion, or other modification.
    - ii. If exceptions are identified, the Proposer **must** also submit (i) a red-lined version of the Terms and Conditions that implements all proposed changes, and (ii) a written explanation or rationale for each exception and/or proposed change.
  - e. Certifications, Attachments, and other requirements.
    - i. The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.
    - ii. The Proposer must complete the Darfur Contracting Act Certification (Attachment 5) and submit the completed certification with its proposal.
- 7.2 Cost Proposal. The following information must be included in the cost proposal.
- i. A detailed line-item budget showing total cost \$191,400 each year of the proposed services. Proposed budget should be presented for each year of the three-year program. Items on the budget can include salaries and benefits, equipment, software licenses, technology, training, travel, etc.
  - ii. A full explanation of all budget line items in a narrative entitled “Budget Justification.”
  - iii. A “not to exceed” total for all work and expenses payable under the contract, if awarded.

**NOTE:** It is unlawful for any person engaged in business within this state to sell or use any article or product as a “loss leader” as defined in Section 17030 of the Business and Professions Code.

## 8.0 OFFER PERIOD

A Proposer's proposal is an irrevocable offer for ninety (90) days following the proposal due date. In the event a final contract has not been awarded within this period, the Judicial Council reserves the right to negotiate extensions to this period.

## 9.0 EVALUATION OF PROPOSALS

At the time proposals are opened, each proposal will be checked for the presence or absence of the required proposal contents.

The Judicial Council will evaluate the proposals on a 100-point scale using the criteria set forth in the table below. Any award, if made, will be to the highest-scored proposal.

If a contract will be awarded, the Judicial Council will post an intent to award notice at <http://www.courts.ca.gov/rfps.htm>

<b>CRITERION</b>	<b>MAXIMUM NUMBER OF POINTS</b>
Quality of work plan submitted	<b>20</b>
Experience on similar assignments	<b>15</b>
Cost	<b>30</b>
Credentials of staff to be assigned to the project	<b>10</b>
Acceptance of the Terms and Conditions	<b>15</b>
Ability to meet timing requirements to complete the project	<b>10</b>

## **10.0 INTERVIEWS**

The Judicial Council may conduct interviews with Proposers to clarify aspects set forth in their proposals or to assist in finalizing the ranking of top-ranked proposals. The interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the Judicial Council's offices. The Judicial Council will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The Judicial Council will notify eligible Proposers regarding interview arrangements.

## **11.0 CONFIDENTIAL OR PROPRIETARY INFORMATION**

PROPOSALS ARE SUBJECT TO DISCLOSURE TO THIRD PARTIES AND MEMBERS OF THE PUBLIC PURSUANT TO APPLICABLE LAWS, INCLUDING PUBLIC DISCLOSURE PURSUANT TO RULE 10.500 OF THE CALIFORNIA RULES OF COURT. Except as required by law, the Judicial Council will not disclose (i) social security numbers, or (ii) balance sheets or income statements submitted by a Proposer that is not a publicly traded corporation. All other information in proposals may be disclosed in response to applicable public records requests, or as otherwise required by law. Such disclosure may be made regardless of whether the proposal (or portions thereof) is marked "confidential," "proprietary," "copyright ©," or otherwise, and regardless of any statement in the proposal (a) purporting to limit the Judicial Council's right to disclose information in the proposal, or (b) requiring the Judicial Council to inform or obtain the consent of the Proposer prior to the disclosure of the proposal (or portions thereof). Any proposal that is password protected, or contains portions that are password protected, may be rejected. Submission of any proposal pursuant to this RFP constitutes acknowledgment and consent by the Proposer to the potential public disclosure of its proposal content, pursuant to this Section 11.0. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

## **12.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE**

The Judicial Council has waived the DVBE incentive in this solicitation.

### **13.0 PROTESTS**

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contracting Manual (see [www.courts.ca.gov/documents/jbcl-manual.pdf](http://www.courts.ca.gov/documents/jbcl-manual.pdf)). Failure of a Proposer to comply with the protest procedures set forth in that chapter will render a protest inadequate and non-responsive, and will result in rejection of the protest. The deadline for the Judicial Council to receive a solicitation specifications protest is the proposal due date. In order to be considered valid, all such protests must be submitted by email to: [Solicitations@jud.ca.gov](mailto:Solicitations@jud.ca.gov) and must indicate the solicitation number and name of your court in the subject line of your email.