

INLAND COUNTIES LEGAL SERVICES, INC.**REQUEST FOR PROPOSALS RFP****TIG #19025
HotDocs Developer**

Inland Counties Legal Services, Inc. (ICLS) is initiating this Request for Proposals (RFP) to solicit responses from vendors interested in converting legal forms and pleadings into interactive HotDocs templates and interviews to be stored and accessed on the LawHelp Interactive server (LHI).

1. PURPOSE AND DESCRIPTION:**1.1. Purpose:**

ICLS is initiating this Request for Proposals (RFP) to solicit responses from vendors interested in converting legal forms and pleadings into HotDocs forms and interviews hosted on the LawHelp Interactive HotDocs Server (LHI) and then publishing them in an automated format on the LHI Server for access by consumers and attorneys in California. These forms will allow low income citizens and/or attorneys, in an interview format, to complete forms and pleadings for presentation to their local Courts. ICLS's goal is to provide an easy to use system of assembling acceptable, high quality court forms.

The successful vendor will assist ICLS with the creation and coding of the documents as outlined on Exhibit B. Links to each document are provided on Exhibit B. The successful vendor will work with a content development vendor and with the LHI technical staff to ensure that the templates and interview content will be easy to modify by ICLS staff. Additionally, the vendor will work with LHI to ensure that all templates are linked to ICLS's case management service (CMS), LegalServer, in order to automatically populate information from the CMS into the templates hosted on LHI.

1.2. Goal:

Our plan is to create a virtual remote office where ICLS attorneys, volunteer attorneys and consumers will be able to prepare forms and pleadings automatically that will be acceptable for use by their local Courts. As such, the goal of this RFP will be to create documents that interface with ICLS's CMS so that attorneys will have the ability to complete, print and file the proper forms and pleadings.

1.3. PRODUCT and Services Required:

The PRODUCT is to meet all the mandatory requirements listed in Exhibit A and B.

1.4 **Timeline for Completion:** The PRODUCT is to be completed by June 30, 2021.

1.5 **Payment:** Successful bids must be for no more than \$24,000.00. Payment will be made in two installments contingent upon completion of templates and interviews. The first installment payment will be made on or before December 31, 2020 upon satisfactory completion of the first tier of templates and interviews including their placement on LHI as described on Exhibit B. The second and final payment will be made upon the satisfactory

completion and evaluation of the second tier of templates and interviews including their placement on LHI as described on Exhibit B.

2. RFP ADMINISTRATION AND INSTRUCTIONS TO VENDORS:

- 2.1. **RFP Coordinator:** Upon release of this RFP, all vendor communications concerning this acquisition must be directed to the RFP Coordinator listed below. Any oral communications will be considered unofficial and nonbinding on ICLS. Only written statements issued by the RFP Coordinator may be relied upon.

Tessie Cross, Deputy Director of Operations
 Inland Counties Legal Services
 1040 Iowa Ave., Suite 109
 Riverside, CA 92405
 Email: tcross@icls.org
 Telephone: 888-245-4257 ext. 4524

2.2. RFP Schedule:

RFP released— February 25, 2020
 Responses due not later than 12 noon PST—April 10, 2020
 Evaluation Period—April 14, 2020
 Successful vendor announced— April 17, 2020
 Contract signed and work commences— April 24, 2020

2.3. Work Schedule:

First Tier of Templates and Interviews— December 31, 2020
 Second Tier of Templates and Interviews— June 30, 2021

- 2.4. **Vendor Questions:** Vendors must contact the RFP Coordinator by email at the email address listed in Subsection 2.1 above with any questions concerning this RFP.

- 2.4.1 **Pre-Qualification:** All bidders must contact the RFP Coordinator prior to submitting a bid in order to be pre-qualified. All initial questions must be accompanied with, at a minimum, the information required in Exhibit A question number 1 in order to be pre-qualified to receive a bid packet and engage in Q&A regarding the bid.

- 2.4.2 **Bid Packets:** Vendors who comply with 2.4.1 will receive will be added to a Yammer channel where they will have access to a bid packet and can engage in Q&A with the RFP Coordinator and see all other vendors' Q&A.

- 2.4.3 All questions subsequent to a vendor's initial question must be asked on the Yammer channel prior to the response due date and time listed in Subsection 2.2 above.

- 2.5. **Response Time and Format:** The proposal must be sent electronically via email in MicAdobe PDF format to the RFP Coordinator designated in Section 2.1 of this RFP. The email subject should be clearly marked "TIG #19025 HotDocs Developer".

- 2.5.1. The vendor's response, in its entirety, must be received by the RFP Coordinator in Riverside, CA,

in accordance with the schedule contained in Subsection 2.2 above. Late responses will not be accepted and will be automatically disqualified from further consideration. Vendors should allow enough electronic delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Vendors assume the risk for any email delay problems.

- 2.5.2. Proposals that exceed 20 pages in length (excluding charts and graphs) will not be accepted. Late proposals will not be accepted and will be automatically disqualified from further consideration.
- 2.6. **Response Requirements and Content:** Vendors must respond to each question/requirement contained in Exhibit A, Vendor Response. In preparing their response, vendors should restate each requirement and then give their response.
- 2.7. **Costs of Preparing Responses:** ICLS will not pay any vendor costs associated with preparing responses, submitted in response to this RFP.
- 2.8. **Responses Property of ICLS:** All responses, accompanying documentation and other materials submitted in response to this RFP shall become the property of ICLS and will not be returned.
- 2.8.1 **Proprietary Information/Public Disclosure:** All responses received shall remain confidential until the evaluation is completed and the vendor is selected and approved. Thereafter responses shall be deemed public records.
- 2.9. **RFP Amendments/Cancellation/Reissue/Reopen:** ICLS reserves the right to change the RFP Schedule or issue amendments to this RFP at any time. ICLS also reserves the right to cancel or reissue the RFP. All such actions will be posted on ICLS's website.
- 2.10 **Minor Administrative Irregularities:** ICLS reserves the right to waive minor administrative irregularities contained in any response.
- 2.11. **Inability to Enter Contract:** ICLS reserves the right to eliminate from further consideration any vendor that ICLS, because of legal or other considerations, is unable to contract with at the time responses are due in accordance with the schedule contained in Subsection 2.2 above.
- 2.12. **No Obligation to Enter a Contract:**
- 2.12.1. The release of this RFP does not compel ICLS to enter any contract.
- 2.12.2. ICLS reserves the right to refrain from contracting with any vendor that has responded to this RFP regardless of whether the vendor's response has been evaluated and regardless of whether the vendor has been determined to be qualified. Exercise of this reserved right does not affect ICLS's right to contract with any other vendor.
- 2.12.3. ICLS reserves the right to permit an interview with any vendor and/or a demonstration from any vendor prior to entering a contract with that vendor. If a vendor declines the request for an interview or demonstration for any reason, the vendor may be eliminated from further consideration.
- 2.13. **Multiple Contracts:** ICLS reserves the right to enter contracts with more than one vendor as a result of this RFP.

2.14. **Non-Endorsement:** The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to ICLS in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of ICLS.

2.15. **Contract Payment Limitations:** Vendors should anticipate payment at the end rather than the beginning of the invoice period in which they provide services or after they submit any deliverable for which a payment is due.

3. RFP EVALUATION:

3.1. ICLS Evaluation Team (Team) of at least two (2) people will evaluate the responses to this RFP. The Team may also consider past contract performance and check references beyond those listed in the vendor's response.

3.2. As part of the evaluation process, at the discretion of the Team, vendors may be asked to clarify specific points in their response. However, under no circumstances will the vendor be allowed to make changes to the response.

4. POST EVALUATION

4.1. **Notification of Selection of Successful Vendor:** The successful Vendor and Vendors whose responses have not been selected for further negotiations or award will be notified via email on or before April 17, 2020.

4.2. **Contract Award/General Terms and Conditions:** A vendor selected to provide application services will be expected to enter into a contract with ICLS on or before April 24, 2020.

4.3 **Appeals:** Requests to appeal the rejection of a bid must be made to the RFP Coordinator in 2.1 above by email as soon as possible after the announcement of the award.

4.3.1 **Time is of the essence** in requesting an appeal as a contract may be signed prior to the contract deadline in 2.2 above.

4.3.2 **Compelling Business Reason** Requests for an appeal must set out a compelling business reason why the appeal should be considered.

4.3.3 **Discretionary Consideration:** Appeals of bid rejections may be accepted or rejected at the sole discretion of ICLS management.

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EXHIBIT A - VENDOR RESPONSE

Responses must contain the following information in the following format. Please number your responses to correspond with the information requested here.

1. Vendor's name, address, federal tax identification number or Social Security Number (SSN), Uniform Business Identifier (UBI) number, and a description of the vendor's legal status, e.g., corporation, sole proprietor, etc. Additionally, if applicable, address of corporate headquarters, state of incorporation and business insurance information.
2. Vendor's contact name, telephone number, fax number and email.
3. A statement that guarantees that the response constitutes a **firm offer** valid for sixty (60) days following receipt, and that ICLS may accept any time within the 60-day period.
4. A statement on whether the vendor or any employee of the vendor is related by blood or marriage or current or former business association to an ICLS employee or resides with an ICLS employee. If there are such relationships, list the names and relationships of said parties. Include the position and responsibilities within the vendor's organization of such vendor employees.
5. State whether the vendor has been a party in any litigation during the past five (5) years, all such incidents except employment related cases must be described, including the other parties' name, address, and telephone number. Present the vendor's position on the matter.
6. Provide two (2) references for programs for other content development projects you have completed. Provide references of customers only of similar size, scope, and service offerings. Please include a phone number or email address of the referenced customer and contact so he/she may be contacted. Also, provide a sample contract or service agreement.
7. Describe how the vendor will work with ICLS staff to develop the content for the forms and pleadings.
8. Describe in detail the project plan and timeline to convert each form listed in Exhibit B. Propose the cost to develop each form and interview on the LHI and then publish them in an automated format on LHI. The LHI website can be found at <https://lawhelpinteractive.org/>. Each form should also include instructions that are printed at the conclusion of the form and printed with the form.
9. State your assurance that you can meet the schedule of work in 2.3 above and that you agree to have all templates and interviews completed no later than June 30, 2021.

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EXHIBIT B – TEMPLATES

TIER ONE FORMS:

1. Retainer
2. Consent to Dual Representation
3. Fee Waiver
4. Order on Fee Waiver
5. Fee Waiver Attachment
6. Fee Waiver Additional Fees Waived
7. Substitution of Attorney
8. Notice of Limited Scope Representation
9. Demurrer
10. Motion/Opposition to Quash
11. Motion to Set Aside
12. Answer Pleading with Attachment
13. Bill of Particulars
14. Limited Civil Summons and Complaint/Cross Complaint
15. Requests for Admission
16. Requests for Production
17. Special Interrogatories
18. Motion to Exceed 35 Discovery Questions
19. CCP 96

TIER TWO FORMS:

1. Subpoena Duces Tecum
2. Subpoena to Appear at trial
3. Notice to Appear
4. Damages Calculator
5. Motion to Deem Matters Admitted
6. Motion to Compel and for Sanctions
7. Motion for Summary Judgment
8. Motion for Directed Verdict
9. Motions in Limine
10. Opposition to Motion to Deem Matters Admitted
11. Opposition to Motion to Compel and for Sanctions
12. Opposition to Motion for Summary Judgment
13. Opposition to Motion for Directed Verdict
14. Opposition to Motions in Limine
15. Witness List
16. Cross Examination of Custodian of Records
17. Stipulation
18. Trial Brief
19. Motion to Reconsider
20. Notice of Appeal
21. Complaint Collateral Attack on Judgment