

Request for Proposals for

Access to Justice Legal Aid Infrastructure and Innovation Family Law DissoDocs App Development



ISSUED BY

Inland Counties Legal Services
1040 Iowa Ave., Suite 106
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PROPOSAL DUE

May 23, 2022

INLAND COUNTIES LEGAL SERVICES, INC.**REQUEST FOR PROPOSALS RFP****Access to Justice Legal Aid Infrastructure and Innovation Family Law DissoDocs
App Development**

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 Docassemble templates and interviews to be stored and accessed on the Afterpattern (formerly Community Lawyer) website.

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

ICLS is initiating this Request for Proposals (RFP) to solicit responses from vendors interested in supporting ICLS staff tasked with converting legal forms and pleadings into Docassemble forms and interviews hosted on the Afterpattern website for access by consumers and attorneys in Riverside and San Bernardino Counties in the state of California, and ultimately throughout California. These forms will allow low-income persons 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 high quality court forms, pleadings, correspondence, instructional and educational materials.

The successful vendor will assist ICLS with the creation and coding of the documents as outlined on Exhibit B.

The successful vendor will support the creation of English and Spanish language computer applications for use on a tablet, computer or smartphone that will automatically generate petitions for dissolutions, responsive pleadings, request for orders, and other family law pleadings. The computer application will be built using the document assembly program Afterpattern. The documents produced may be printed, downloaded or emailed as needed. The Docassemble templates will be hosted by Afterpattern and will be published on their website. The successful vendor will work with ICLS staff and with the Afterpattern technical staff to ensure that the templates and interview content will be easy to modify by ICLS staff.

The successful vendor will provide 50 hours of support to ICLS staff spread over 7 months with a large percentage (approximately 25 hours) of that time being spent in the first two months of the contract. During these two months, the successful vendor will meet with ICLS staff to understand their goals with the Afterpattern project, review and suggest changes to the project plan, provide technical assistance through mentorship to ICLS staff and troubleshooting issues with the creation of the interview content, databases, templates, and issues with third party integration. This will involve working with ICLS staff, Afterpattern staff and other parties.

The remaining 25 hours will be spread across 5 months, with a weekly meeting between the successful vendor and ICLS to troubleshoot any issues with the creation and launch of the project, and to provide ICLS staff technical knowledge about preparing instructions for easy modification of the templates and interview content.

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.

Survivors of sexual assault and domestic violence are in considerable need of civil legal representation and assistance navigating the court system. Sexual assault and domestic violence survivors need legal assistance to protect them and their children, to gain financial independence, to maintain safe housing; to secure or maintain their immigration status; and to swiftly access other benefits to ensure their economic stability. In the rural communities that Inland Counties Legal Services (ICLS) serves, ICLS is the primary provider of free legal representation to victims and private attorneys cannot fill the legal need of low-income victims.

As an example of the unmet need, in fiscal year 2019-2020, Riverside County Family Law and Juvenile division there were 24,881 filings, San Bernardino County reported 27,647 filings for the same period. Though dated, in a study published by the Superior Court of California in 2004, 67% of petitioners in family law matters were self-represented. At the disposition stage, 80% of petitioners in dissolutions were self-represented. For calendar years 2019 and 2020, ICLS provided assistance in a total of 662 cases ranging from counsel and advice to full-representation.

To address the unmet needs of self-represented litigants, ICLS will develop a mobile-friendly guided interview that will greatly expedite document preparation for survivors of domestic violence and other persons at various stages throughout dissolution proceedings. The guided interview will be available in both English and Spanish and will be utilized by ICLS staff and advocates, as well as community-based organizations (CBOs) in rural areas of Riverside and San Bernardino counties to gather information, triage, and automate the document preparation process based upon the user's responses. In addition, the app will provide the user with legal information regarding their proceedings as well as next steps in their journey to obtaining a dissolution judgment. The app will also be utilized by ICLS staff and ICLS volunteer attorneys to expedite document assembly upon determination that an applicant is eligible for services. Upon establishing applicant eligibility, a link will be provided so that the applicant may complete the interview on their own.

Additionally, the reduction in time dedicated to preparing documents will allow staff greater capacity to assist additional applicants with family law issues and facilitate private attorney involvement opportunities.

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 in Tiers as listed in Exhibit B, with final completion by December 31st, 2022.
- 1.5 **Payment:** Successful bids must be for no more than \$10,000.00. Payment will be made in three installments contingent upon completion of templates and interviews. The first

installment payment will be made on or before July 31st, upon satisfactory completion of the first tier of templates and interviews including their placement on Afterpattern as described on Exhibit B. The second payment will be made upon the satisfactory completion of the second tier of templates and interviews including their placement on Afterpattern as described on Exhibit B. The third and final payment will be made upon the satisfactory completion of the third tier of templates and interviews including their placement on Afterpattern 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 106
 Riverside, CA 92405
 Email: tcross@icls.org
 Telephone: 888-245-4257 ext. 4524
 Cellphone: 909-419-6256

2.2. **RFP Schedule:**

RFP released— Friday, May 13th, 2022
 Responses due not later than 12 noon PST— Monday, May 23rd, 2022
 Evaluation Period— Tuesday, May 24th, 2022
 Successful vendor announced— Tuesday, May 24th, 2022

2.3. **Work Schedule:**

First Tier Guided Interview — June 30th, 2022
 Draft of Second Tier Templates and Interviews –September 30th, 2022
 Draft of Third Tier Templates and Interviews –December 31st, 2022

- 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 can engage in Q&A with the RFP Coordinator and will receive copies of all other vendors' Q&A.

2.4.3 All questions subsequent to a vendor's initial question must be asked via email 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 Adobe PDF format to the RFP Coordinator designated in Section 2.1 of this RFP. The email subject should be clearly marked "ATJ I&I DissoDocs RFP Response".
- 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.

2.15.1 **Indirect Costs Limitations:** Vendors' budgets must limit indirect costs to no more than 10% of the total cost of the award.

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 May 24th, 2022.

4.2. **Contract Award/General Terms and Conditions:** The vendor selected to provide application services will be expected to enter into a contract with ICLS on or before May 27th, 2022.

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 ninety (90) days following receipt, and that ICLS may accept any time within the 90-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 Afterpattern and then publish them in an automated format on Afterpattern . The Afterpattern website can be found at <https://afterpattern.com/> 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 December 31st, 2022.

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EXHIBIT B – TEMPLATES

Completed by June 30th, 2022:

Tier 1 Forms:

Fee Waiver (FW-001)
Order on Fee Waiver (FW-003)
Petition for Dissolution (FL-100) and Attachments With and Without Children
Summons (FL-110)
Response to Petition for Dissolution and attachments (FL-120)
Child Custody and Visitation Attachment (FL-311)
Request for Child Abduction Prevention Orders (FL-312)
Children's' Holiday Schedule Attachment (FL-341(c))
Additional Provisions- Physical Custody Attachment (FL-341(d))
Attachment to Judicial Council form (MC-025 – for declarations)
Preliminary Declaration of Disclosure (FL-140)
Declaration Regarding Service (FL-141)
Schedule of Assets and Debts (FL-142)
Property Declaration (FL-160)
Income and Expense (FL-150)
UCCJEA (FL-105)
Riverside County Only- Declaration of Residence (RI-FL036)
San Bernardino County Only-Certificate of Assignment (13-16503-360)

Completed by September 30th, 2022

Tier 2 Forms:

Request for Orders and Attachments (FL-300)
Responsive Declaration to Request for Order (FL-320)
Attachment to Judicial Council form (MC-025) – (for declarations)
Child Custody/Visitation/Support (FL-311)_
Spousal Support (FL-157)

Completed by December 31st, 2022

Tier 3 Forms:

Riverside County Only-Mandatory Settlement Conference (RI-FL008)
San Bernardino County Only- At-Issue Memorandum (SB-12389)
Default Documents:
Request to Enter Default (FL-165)
Declaration for Default or Uncontested Matter (FL-170)
Judgment (FL-180)
Notice of Entry of Judgment (FL-190)
Child Support Case Registry Form (FL-191)