

**INLAND COUNTIES LEGAL SERVICES, INC.
REQUEST FOR PROPOSALS (RFP)
Dissodocs (Legal Aid Infrastructure & Innovation Grant)**

Project Evaluator

Inland Counties Legal Services, Inc. (ICLS) is initiating this Request for Proposals (RFP) to solicit responses from vendors interested in evaluating Dissodocs, a document automation project. ICLS staff created interviews and template court forms using Afterpattern- a no-code legal document automation platform.

About Inland Counties Legal Services Inc. (ICLS)

Inland Counties Legal Services, Inc. is a nonprofit organization providing legal services to low-income persons and the elderly residing in Riverside and San Bernardino Counties. ICLS has been in existence since 1958. ICLS targets services to the poor and to seniors in the greatest social or economic need. Legal services are provided by attorneys, or paralegals under the direct supervision of an attorney. Services include advice and counsel, limited action (including negotiation and preparation of legal documents), as well as direct representation before administrative judges and civil courts. Legal assistance is provided in areas including housing; family; consumer; tax and bankruptcy; public benefits, Social Security; healthcare access; immigration, education rights and systemic impact litigation.

ICLS is funded in part by the Legal Services Corporation (LSC). LSC is a federally funded grant making organization that supports civil legal aid providers across the country. Its mission is to expand access to justice by funding high-quality, free attorneys for low-income Americans in basic civil matters like divorce, child custody, and eviction. It does not provide direct legal services itself.

1. PURPOSE AND DESCRIPTION

1.1. Purpose

ICLS is initiating this Request for Proposals (RFP) to solicit responses from vendors interested in evaluating our Dissodoc project automating dissolution court forms and pleadings using Afterpattern. ICLS staff developed applications consisting of guided interviews and template forms. These applications are intended to be used by low income pro-se litigants located in Riverside and San Bernardino counties, to complete their dissolution documents. The hope is that using these applications will make the process of form completion easier for the pro-se litigant, compared to completing the forms on their own.

The successful vendor will assist ICLS with the evaluation of template usage, conduct surveys, and hold focus groups of users and clients to assess the success of the project as appropriate. The successful vendor will work with ICLS to create meaningful surveys

of users and clients. ICLS will also participate in follow-up questioning of clients after surveys including any focus groups the evaluator conducts. ICLS will review the development of the evaluation with the contractor on a weekly basis during the review period.

1.2. Goal

ICLS's plan is to create a virtual remote office for ICLS attorneys, volunteer attorneys, and pro se litigants that will allow for remote automated creation of both petition and response forms and pleadings.

1.3. Product and Services Required

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

1.4. Timeline for Completion: The PRODUCT is to be completed by APRIL 26, 2023.

1.5. Payment: Successful bids must be for no more than \$15,000.00. Payment will be made in three installments contingent upon completion of specific services.

1.5.1. The first installment payment will be made on or before January 31, 2023 upon satisfactory completion of the evaluation plan.

1.5.2. The second payment will be made on or before April 7, 2023 upon the completion of the first draft of the Evaluation.

1.5.3. The third and final payment will be made on or before April 26, 2023 upon the satisfactory completion of the final evaluation report to be submitted to the Access to Justice Commission.

2. RFP ADMINISTRATION AND INSTRUCTIONS TO VENDOR

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
Direct Line: (951) 248-4524

2.2. RFP Schedule

RFP released – December 7, 2022
Responses due not later than 12 noon PST – December 23, 2022
Evaluation Period – December 28, 2022
Successful vendor announced – December 31, 2022
Contract signed and work commences – January 2, 2023

2.3. Work Schedule

Evaluation Plan Completed – January 15, 2023
Set up of control test groups – January 31, 2023
Evaluation Completed – March 30, 2023
Evaluation Report Submitted – April 28, 2023

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.

2.5. 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 Legal Aid Infrastructure & Innovation Grant

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 (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

The release of this RFP does not compel ICLS to enter any contract.

2.12.1. 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.

2.12.2. 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 because 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.

3.1.1. 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

4.1.1. 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 December 31, 2022.

4.2. Contract Award/General Terms and Conditions: ICLS Board of Directors may be required to approve entering into a contract with the selected vendor in accordance with ICLS' procurement procedures. A vendor selected to provide application services

will be expected to sign a contract with ICLS on or before December 31, 2022

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- 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 evaluation projects you have completed. Provide references of customers only of similar size, scope, and service offerings. Please include the 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 evaluate the project.
8. Describe in detail the project plan and timeline to evaluate this project.
9. State your assurance that you can meet the schedule of work in 2.3 above and that you agree to evaluate all templates and interviews no later than March 30, 2023.

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EXHIBIT B – Scope of Work

1. Evaluation Plan

The Evaluator must produce a detailed plan with scheduled milestones explaining how they will conduct the evaluation and what input ICLS must provide.

2. Evaluation Content

- The evaluation should review, compare and contrast the ease of form completion compared to user completing court forms on their own.
- The evaluation should analyze the costs and benefits of automation relative to the ability to increase client intake, pro se assistance and representation.
- The evaluation should use surveys to analyze the user experience for San Bernardino and Riverside based clients.
- The evaluation should use focus groups of clients to gather insightful commentary on the client user's experience.
- The final evaluation should cover the efficiency and effectiveness of the project's completion, the impact of the project on ICLS's productivity and quality control, and the impact of the project on the client community using meaningful metrics to show impacts both statistically and anecdotally.

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