

## **REQUEST FOR PROPOSAL**

### **To conduct a comprehensive Georgia Legal Needs Survey**

#### **On behalf of the Supreme Court of Georgia Equal Justice Commission Committee on Civil Justice**

The Supreme Court of Georgia Equal Justice Commission Committee on Civil Justice (“CCJ”) requests qualified research organizations to submit a statement of qualifications and a detailed proposal for a comprehensive survey of civil legal needs in the State of Georgia (“Legal Needs Survey”).

CCJ has formed a Delivery Coordination and Needs Assessment subcommittee in order to gain input from legal and social services professionals into the research process. CCJ has discussed project objectives and established subcommittees to provide feedback on vendor selection, questionnaire design and analysis.

### **BACKGROUND AND OBJECTIVES**

It has been thirteen years since the State Bar of Georgia obtained an assessment of civil legal needs of low-income people in Georgia. The 1994 study of *Legal Needs Among Low and Moderate Income Households In Georgia* provided data that were needed to help secure more public support in response to the growing legal needs of low income and moderate individuals. Since that time, the state’s demographic composition has changed, and revisions in the law and in the roles of courts have changed the legal needs of the low-income population. These events have affected the ability of legal aid programs to respond to the changing needs within constraints imposed by limited resources.

Accordingly, CCJ has determined that it is essential to obtain an updated Legal Needs Survey to assist CCJ and the Supreme Court in formulating a long-term strategic plan for the funding and successful delivery of legal services. The new Legal Needs Survey will assist CCJ in fulfilling its mission to develop, coordinate and support policy initiatives to expand access to, and enhance the quality of, Georgia’s civil justice system, assuring equal justice for all.

Specific goals of the Legal Needs Survey are to:

- Identify and quantify met and unmet needs for civil legal services;
- Obtain data to help guide policy and advocacy efforts to increase financial, human, and in-kind resources for civil legal aid;
- Obtain data to help guide policy decisions regarding the wise and efficient use of all available resources.

### **SCOPE OF LEGAL NEEDS SURVEY**

CCJ anticipates that the completed Legal Needs Survey will include: (1) a Random Digit Dial (“RDD”) telephone survey with a highly representative sample of the population of low-income households in Georgia with incomes of not more than 150% of the Federal Poverty Level; (2) a RDD telephone survey among moderate-income households with incomes between 150% to 300% of the Federal Poverty Level; (3) Focus groups of selected hard-to-reach client populations; (4) Face-to-face interviews of approximately 24 to 30 selected individuals identified from the telephone survey for a more in-depth interview of approximately 20 to 30 minutes; (5) Face-to-face interviews with approximately 200 members of populations that cannot be reached by telephone; (6) an Internet survey of legal aid providers, social service agencies, faith-based groups, and court personnel; (7) Focus groups ranging in size from 8 to 12 participants with approximately four to six groups of legal aid providers, social service agencies, faith-based groups, and court personnel; (8) a telephone survey of approximately 300 attorneys, regarding their participation in pro bono services.

### **RESEARCH VENDOR QUALIFICATIONS**

#### Research Vendor Background Information

Research vendors interested in responding to this Request For Proposals should also submit a brief summary of capabilities and qualifications to conduct the study in Georgia. Please indicate the areas of the Legal Needs Survey for which your research organization has in-house capabilities and for which you foresee subcontracting. For all areas in which those research vendors foresee subcontracting, the research vendor shall submit the names of likely subcontractors, and a brief description of the qualifications of likely subcontractors.

CCJ anticipates that the successful research vendor will have specific expertise and experience in areas as follows: 1) questionnaire development & administration and sample design, 2) data management, 3) quality assurance, and

4) training. In addition, research vendors shall be required to program questions and response categories into a computer-assisted telephone interviewing (CATI) system. The CATI system must permit data entry at time of interview, provide error and range checking, be programmed for skip patterns, and, manage the telephone sample.

The successful research vendor shall also have procedures for quality assurance that include at a minimum, a pre-test of the telephone survey instruments, supervision and monitoring of telephone interviewers during all calling shifts, monitoring through the use of unobtrusive, electronic two-way audio and video means, and supervision and monitoring of moderators and field interviewers during the focus groups and personal face-to-face interviews. Furthermore, the successful research vendor shall ensure that interviewers have experience in conducting telephone interviews and shall have available an interview staff that is diverse with regard to age, race, sex, and bilingual Spanish/English language fluency. The successful research vendor also shall ensure the training of interviewers in the administration of the questionnaires. Research vendors shall also ensure that all interviewers have opportunities to conduct practice interviews before each relevant component of the Legal Needs Survey is implemented. Finally, the successful research vendor shall develop and maintain procedures to ensure respondents' confidentiality. Personal identifiers should be excluded from data sets, and sample files that include identifiers should be destroyed.

CCJ prefers that the successful research vendor have experience with and knowledge of government in the State of Georgia.

In responding to the request for research vendor qualifications, please include information about the research vendors' background, expertise, experience, or capabilities in areas as follows:

- The organization is legally permitted to conduct business in Georgia;
- A history of the organization, focusing on experience relevant to the project, specifically research among low-income populations or experience that the research vendor has in conducting surveys regarding needs for and delivery of social services to low-income populations, including legal needs if applicable;
- Survey research among Hispanics;
- Survey research among hard-to-reach populations, such as ethnic/language minorities, migrant workers, homeless persons, deaf persons, and institutionalized persons;

- Sample design, telephone sampling frames;
- Interviewing resources, bilingual telephone and in-person interviewers;
- Evidence of acceptable performance on past surveys as measured by response rates (indicate how calculated), refusal rates, and refusal conversions;
- Managing data files and developing file layouts;
- Data processing, statistical analysis, coding of multilingual responses;
- Research analysis and reporting;
- Storage capabilities and back-up schedule and system for sample files, completed interviews, and data files;
- Processes for obtaining informed consent, maintaining confidentiality of all respondents, including the period of time that personal identifiers will be kept, how they will be protected, and how the identifying information will be destroyed.

#### Call Center Information

Describe the layout and operations of the call center, including computer resources and the number of licensed workstations available for interviewing. If subcontractors are to be used for any part of the telephone survey, the proposal must include a detailed description of the organizational capacity and structure of the sub-contractor. Include a complete description of procedures used to monitor interviewers and verify responses. Describe procedures and processes for remote monitoring, if available.

CCJ reserves the right to make site visits during the evaluation period if the research vendor and/or subcontractor has no prior telephone survey experience.

#### Research Vendor Staff Information

Please include an organizational chart highlighting the persons or unit(s) responsible for the project. Describe the qualifications and relevant experience of the project supervisor and key interviewing staff. Specify the involvement of the project supervisor and the key interviewing staff in terms of hours/days to be spent on the project. Attach the resumes of the principal investigator, key supervisory

staff, and all other persons involved in the project, detailing length of experience in survey projects, experience with telephone surveys, experience with CATI software, experience with focus groups, and experience with personal face-to-face interviews. Describe the interview staff, including number of available interviewers; diversity of the interview staff with regard to age, race, and sex; foreign language interviewers; the extent of interviewers' prior experience; and interviewers with specific training or expertise in refusal conversion.

### References

Please provide the name, organization, title, and contact information (including area code and telephone number, and e-mail address) of three individuals familiar with the work of the research vendor.

## **DESCRIPTION OF LEGAL NEEDS SURVEY WORK**

The core of the Legal Needs Survey will involve a telephone survey with a highly representative sample of the population of low-income households in Georgia with incomes of not more than 150% of the Federal Poverty Level. CCJ has discussed a potential add-on to this core research involving a sampling of moderate-income households in Georgia with incomes between 150% to 300% of the Federal Poverty Level. In addition, CCJ anticipates supplementing the quantitative survey with a qualitative research effort to reach populations that would be under-represented through telephone interviewing, e.g., certain ethnic/language minorities, rural residents, migrant workers, homeless persons, deaf persons, and institutionalized persons.

The following is an outline of the planned scope of the probability-sampling research.

### **I. Probability-Sampling Research**

**Telephone Survey.** The telephone survey will consist of approximately 1,000 interviews of persons in low-income households with incomes of not more than 150% of the Federal Poverty Level, with a possible add-on of 200 interviews among persons in moderate-income households with incomes between 150% to 300% of the Federal Poverty Level.

Research vendors are asked to provide a recommended sampling plan for the telephone survey to ensure that the telephone survey produces survey results with a standard error of not more than  $\pm 4$  percentage points, assuming a 95% confidence interval. CCJ recognizes that this may require an adjustment of the sample size. CCJ anticipates that contacting a sample of low-income households and obtaining

their cooperation will involve a targeted sampling strategy. The research vendor will be required to identify households likely to meet income requirements by matching census tract or block level data with telephone exchanges and household phone numbers. Once contact is made with an adult member of the household, interviewers will determine eligibility for the interview by asking introductory questions about annual income and number of persons in the household.

The sample should be large enough to allow subgroup analysis among various important populations:

- Caucasians
- African-Americans
- Hispanics
- Female heads of households
- Families with children
- Elderly
- Residents of geographic regions throughout the State (10 judicial districts)

Research vendors may need to over sample in rural areas to ensure an adequate number of completed responses from underpopulated areas.

Research vendors shall ensure that interviewers make a minimum of 8 call attempts to a household before eliminating a household from the sample. The call attempts shall take place over at least 3 calling occasions consisting of at least 2 calls on a weekend, 2 calls on a weekday, and 2 calls on a weeknight. In addition, research vendors shall randomize inclusion of eligible adults within the household. As part of the detailed proposal, research vendors shall provide a procedure and decision rules for determining whom in the household to interview.

CCJ anticipates that the telephone survey instrument will contain approximately 60 to 80 questions and will take approximately 15 minutes to complete. The survey instrument will most likely contain 1 or 2 brief open-ended questions. In addition, the survey instrument shall contain a carefully-crafted question to determine household income, as defined by CCJ, because this is pivotal information for the survey. Research vendors shall assist CCJ in the design of the survey instrument.

CCJ welcomes guidance on the advisability of deploying a stratified sampling plan to complete a minimum number of interviews in each of 10 geographic regions to ensure inclusion of respondents from across the state. Please advise us on the implications of such stratified sampling on project costs and on the ability to conduct subgroup analysis of the key groups above.

Research vendors shall employ bilingual Spanish/English interviewers to field calls with Spanish-speaking households.

## **II. Qualitative Research Among Client Populations**

### **Supplemental Research among Hard-to-Reach Groups.**

A telephone survey cannot provide an exact cross section of the eligible population. Telephone contact is limited among such groups as certain ethnic/language minorities, migrant workers, homeless persons, deaf persons, and institutionalized persons. In addition, sampling guided by block level residence income, while effective in contacting a sample of most of the eligible population will under-represent some groups, such as rural residents whose census tract or block has a relatively higher income.

CCJ needs to learn not only about these hard-to-reach populations' civil legal needs, but also about cultural barriers that may limit their use of legal services.

We anticipate supplemental research among groups, including but not limited to:

- Certain ethnic minorities: Somalians, Koreans, Cambodians, Haitians, Russians, Vietnamese, and South Asians
- Rural residents
- Migrant workers
- Homeless persons
- Deaf persons
- Institutionalized persons

CCJ requests advice on the best approach to reach these populations. We foresee a qualitative research effort involving a limited number of interviews or focus groups for each population selected by CCJ. Members of CCJ have expressed willingness to assist the research vendor in reaching certain populations through community-based organizations. For example, to reach ethnic minorities, bilingual interviewers may conduct face-to-face interviews by intercepting residents at elderly housing, community centers, shopping centers or other locales. To reach the deaf, homeless and rural residents, the research organization may work through community and/or advocacy groups to schedule face-to-face interviews.

Research vendors are asked to provide a recommended research plan for these face-to-face interviews and focus groups, which shall include suggestions on the number of personal interviews and the number of focus groups to ensure that CCJ receives sufficient qualitative data to fulfill its mission. CCJ recognizes that this may require an adjustment of the suggested focus group sessions and an adjustment in the number of personal interviews.

The following is an outline of the planned scope of the qualitative research among client populations.

**Focus Groups.** CCJ anticipates that research vendors shall conduct approximately four to six focus groups of selected client populations in four different geographic regions of the State selected by CCJ. CCJ anticipates that at least three of the focus groups shall be fielded outside of the five-county metropolitan Atlanta area. Focus groups of selected client populations will allow CCJ to obtain information for hard-to-reach populations for more in-depth discussion of certain issues including, but not limited to 1) ranking of legal needs when a client has more than one legal need, 2) cultural barriers to access, 3) types of assistance desired to help them solve legal problems, 4) outcomes received when handling legal problems themselves, 5) outcomes received when legal problems have been handled by lawyers, and 6) accessibility and use of technology.

Research vendors shall assist CCJ in the selection of focus group topics and shall be responsible for selecting the site for the focus groups, recruiting participants for focus groups, ensuring the attendance of at least 8 to 12 participants at each focus group, providing all materials and equipment for the focus groups, moderating the focus group, recording the discussion, and providing an analysis of the results of the focus groups. Research vendors are solely responsible for the costs associated with the use of any incentives provided to focus group participants.

**Personal Interviews.** Research vendors shall also conduct personal face-to-face interviews from two groups of client populations for qualitative analysis. The first group of personal interviews would be of selected individuals identified from the telephone survey. The second group of personal interviews would be of client populations that cannot be reached by telephone.

Personal Interviews of Selected Individuals from the Telephone Survey: CCJ anticipates that research vendors shall conduct face-to-face interviews of approximately 24 to 30 selected individuals identified from the telephone survey for a more in-depth interview of approximately 20 to 30 minutes. Research vendors would interview approximately 12 to 15 individuals who were served by a legal

services organization and obtain information on the outcome the individual received. In addition, research vendors would also interview approximately 12 to 15 individuals who were not served by a legal service organization and research vendors would obtain information on the outcome the individual received.

Personal Interviews of Individuals that cannot be reached by telephone: CCJ anticipates that research vendors shall conduct a non-probability sample of approximately 200 complete interviews of individuals who cannot be reached by telephone. Research vendors shall audiotape or videotape these interviews. Research vendors are also encouraged to explore innovative options for recording client anecdotes such as the methodology discussed at [www.photovoice.com](http://www.photovoice.com) to engage relevant client populations in dialogue about the strengths and weaknesses of Georgia's civil legal aid delivery system.

Costs Associated with All Personal Interviews of Individuals:

Research vendors will need to conduct interviews of individuals from four geographic regions of the State selected by CCJ. CCJ anticipates that three of the interview regions shall be outside of the five-county metropolitan Atlanta area. In addition, research vendors will need to assist CCJ in the design of the personal interview survey instrument. CCJ anticipates that the personal interview survey instrument will be substantially similar to the telephone survey instrument, although it may contain more open-ended questions.

Research vendors shall be solely responsible for all costs associated with the travel, staffing, and field supervision of the personal interviews in the four geographic regions of the State. Research vendors are solely responsible for the costs associated with the use of any incentives provided to personal interview subjects. Research vendors should include a separate cost itemization of the fees associated with the research vendors memorializing approximately 30 interviews on videotape.

**III. Research Among Legal Aid Providers, Social Service Agencies, Faith-Based Groups, and Court Personnel**

**Internet Survey.** CCJ anticipates that research vendors shall assist CCJ in conducting an Internet survey of legal aid providers, social service agencies, faith-based groups, and court personnel. Research vendors shall assist CCJ in the design of the survey instrument and in analyzing and interpreting the data.

**Focus Groups.** CCJ anticipates that research vendors shall conduct approximately four to six focus groups of selected legal aid providers and community organizations selected by CCJ. CCJ anticipates that the focus group

meetings would be held in Atlanta and consist of persons from community groups, including but not limited to the Atlanta Legal Aid Society, the Georgia Legal Services Program, the Cobb Justice Foundation, DeKalb Volunteer Lawyers Foundation, Atlanta Volunteer Lawyers Foundation, State Bar of Georgia Pro Bono Project, Pro Bono Partnership of Atlanta, law firm Pro Bono Coordinators, providers that are not funded by the Legal Services Corporation (i.e., Georgia Advocacy Office, American Civil Liberties Union of Georgia, Diakonia Christian Legal Services, Georgia Law Center for the Homeless, Catholic Charities, etc), judges, court clerks, and other court personnel, social service agencies, and faith-based organizations. Focus groups of these selected legal aid providers and community organizations will allow CCJ to obtain more in-depth information about certain issues including, but not limited to 1) delivery coordination issues, 2) barriers to access, 3) types of assistance needed to solve legal problems, 4) and vulnerable populations.

Research vendors shall assist CCJ in the selection of focus group topics and shall be responsible for selecting the site for the focus group, recruiting participants for focus groups, ensuring the attendance of at least 8 to 12 participants at each focus group, providing all materials and equipment for the focus groups, moderating the focus group, and providing an analysis of the results of the focus groups.

#### **IV. Telephone Survey of Attorneys Regarding Pro Bono Services**

Finally, CCJ anticipates conducting a RDD telephone survey of approximately 300 attorneys, regarding their participation in pro bono services. CCJ anticipates using the results contained in the 2005 American Bar Association paper, *Supporting Justice: A Report on the Pro Bono Work of America's Lawyers* as a starting point for the design of the survey instrument. CCJ requests that the completed survey results contain responses from 100 attorneys who have participated in pro bono service and from 200 attorneys who have not participated in pro bono services. Research vendors are asked to provide a recommended sampling plan for the telephone survey to ensure that the survey produces results with a statistical accuracy of not more than  $\pm 4$  percentage points, assuming a 95% confidence interval. CCJ recognizes that this may require an adjustment of the sample size. CCJ, with the assistance of the State Bar of Georgia, anticipates providing a list of numbers from which a random sample may be drawn.

Research vendors shall ensure that interviewers place a minimum of 8 call attempts to an attorney at varying times of the day and week before eliminating the attorney from the sample. CCJ anticipates that the telephone survey instrument will contain approximately 60 to 80 questions and will take approximately 15 minutes to complete. The survey instrument will most likely contain 1 or 2 brief open-ended questions. Research vendors shall assist CCJ in the design of the survey

instrument. Research vendors are solely responsible for the costs associated with the use of any incentives provided to interview subjects.

**Research Deliverables.** A summary of project deliverables required of the research vendor is as follows:

- Research plan, sample design;
- Survey Instrument questionnaire design. Questionnaires used in previous legal needs studies will be provided by CCJ to facilitate the development of the final questionnaire;
- Telephone interviews;
- Analyzed focus group results of selected client populations;
- Analyzed focus group results of selected provider and community organizations;
- Personal interviews of selected client populations;
- Data processing and analysis;
- Draft of a final report that includes an integration of the qualitative and quantitative data. Please assume a full written report with narrative text and illustrative black & white graphs, charts, and maps, delivered in an Adobe Acrobat document.

## **SCHEDULE**

The following are projected target dates for the Legal Needs Survey.

RFP sent to qualified research organizations.....	July 2, 2007
Deadline to submit written questions to be addressed at Offeror's Conference.....	July 20
Offeror's Conference (Mandatory) .....	August 14
Deadline to receive proposals .....	September 7
Research supplier selected .....	October 1
Research design and pretest.....	October - December
Data collection.....	January – March, 2008
Data processing and analysis.....	March – May
Comprehensive report and presentation.....	May – July, 2008

## **BUDGET**

The awarding of a contract for the Legal Needs Survey is contingent upon grant funding. CCJ has applied for grant funding for the Legal Needs Survey. In addition, CCJ is engaged in discussions with local bar associations, law firms and attorneys that may be interested in providing funding for the Legal Needs Survey, especially as it relates to the supplemental qualitative research and to the pro bono attorney telephone survey. Because the Legal Needs Survey is contingent on grant funding, CCJ reserves the right to reject any and all proposals submitted in response to this request.

## **MONITORING**

The successful research vendor shall provide CCJ with monthly progress reports, regarding the current status of the Legal Needs Survey. In addition, CCJ reserves the right to have CCJ staff, Committee members, or their designees (1) personally observe or electronically monitor call center activity or telephone interviews; and (2) personally observe focus groups or personal face-to-face interviews.

## **MINORITY BUSINESS ENTERPRISES**

It is the policy of the State of Georgia that minority business enterprises shall have a fair and equal opportunity to participate in the State purchasing process. Research vendors interested in the State's Minority Business Enterprise program should address their questions to the State Small and Minority Business Director.

## **CONFLICT OF INTEREST**

If a research vendor has any existing client relationship(s) that involves the State of Georgia that would prevent their being objective, the research vendor must disclose such relationship(s).

## **CONFIDENTIALITY REQUIREMENTS**

The staff members or sub-contractors that are assigned by the successful research vendor to this project may be required to sign a non-disclosure statement. Copies of the proposals may be provided to anyone properly requesting the same in writing after the contract is awarded. CCJ cannot protect proprietary data submitted in research vendors' proposals.

## **RFP AMENDMENTS**

CCJ reserves the right to amend the RFP prior to the date of proposal submission. Any addenda will be posted to the CCJ web site at [www.gaccj.org](http://www.gaccj.org). It is the responsibility of any proposing vendor to monitor the web site and to include any requirement in any addendum posted to the web site.

## **COSTS FOR PREPARING PROPOSALS**

The cost for developing the proposal is the sole responsibility of the research vendor. Neither CCJ nor the State of Georgia will provide reimbursement for such costs.

## **OFFICE SPACE**

CCJ will not provide office space, telephone service, or clerical support for the project.

## **CONTRACTUAL NEGOTIATIONS**

Prior to award, the apparent winning research vendor will be required to enter into contractual negotiations with the Georgia Administrative Office of the Courts ("AOC") to resolve any contractual differences before an award is made. These discussions are to be finalized and all exceptions resolved within 30 days of notification. If negotiations are not resolved within 30 days of notification of the proposed award, this could lead to rejection of the research vendor's proposal and CCJ may then initiate discussions with CCJ's second-choice research vendor.

## **INSURANCE**

It is anticipated that the final contract shall contain the following insurance provisions:

Vendor shall procure commitments for and shall maintain insurance which shall protect Vendor and the Supreme Court of Georgia, CCJ and its staff, and the AOC from any claims for bodily injury, property damage, or personal injury which may arise out of Vendor's performance of the Contract. Prior to the commencement of performance under the Contract, Vendor shall procure commitments for the insurance coverages identified below at its own expense and shall furnish the AOC with evidence including an insurance certificate establishing the existence of such coverages, and which specifically documents that the liability insurance coverage purchased by Vendor includes contractual liability coverage to protect the Supreme Court of Georgia, CCJ and its staff, and the AOC. All such coverages shall remain

in full force and effect during the Contract and any renewals thereof. To the full extent permitted by the Constitution and applicable Governmental Regulations, the endorsements shall indicate that Vendor and its insurers waive any right of subrogation against the Supreme Court of Georgia, CCJ and its staff, and the AOC and any insurers or self-insurers of the Supreme Court of Georgia, CCJ and its staff, and the AOC including, but not limited to, the Georgia Department of Administrative Services. The insurance certificate must provide the following:

- a. Name and address of authorized agent
  - b. Name and address of insured
  - c. Name of insurance company(ies)
  - d. Description of policies
  - e. Policy Number(s)
  - f. Policy Period(s)
  - g. Limits of liability
  - h. Name and address of the Supreme Court of Georgia Equal Justice Commission Committee on Civil Justice c/o David L. Ratley, Director, Administrative Office of the Courts, 244 Washington Street, SW Suite 300, Atlanta, Georgia 30334 as certificate holder.
  - i. Signature of authorized agent
  - j. Telephone number of authorized agent
  - k. Mandatory thirty (30) days notice of cancellation/non-renewal to David L. Ratley, Director, Administrative Office of the Courts, 244 Washington Street, SW Suite 300, Atlanta, Georgia 30334
1. Each of the insurance coverages required below shall be issued by a company licensed by the Insurance Commissioner to transact the business of insurance in the State of Georgia for the applicable line of insurance, and shall be an insurer (or, for workers' compensation insurance, qualified self-insureds or group self-insureds, a specific excess insurer providing statutory limits) with a Best Policyholders Rating of "A-" or better and with a financial size rating of Class VII or larger. Each such policy shall contain the following provisions:
- a. The insurance company agrees that the policy shall not be canceled, changed, allowed to lapse, or allowed to expire until thirty (30) days after AOC has received written notice thereof as evidenced by return receipt of registered letter.
  - b. The policy shall not be subject to invalidation as to any insured by reason of any act or omission of another insured or any of its officers, employees, agents or other representatives ("Separation of Insureds").
  - c. The policy may have a self-insured retention or deductible; provided, however, the self-insured retention (except for

qualified self-insurers or group self-insurers) or the deductible, as the case may be, in any policy shall not exceed \$5,000.00.

2. Insurance Coverages. Vendor agrees to purchase and have the authorized agent state on the insurance certificate that the following types of insurance coverages have been purchased by Vendor. The minimum required coverages and liability limits are as follows:
  - a. Workers' Compensation. Vendor agrees to provide Workers' Compensation coverage in accordance with the statutory limits as established by the General Assembly of the State of Georgia.
  - b. Employers' Liability Insurance. Vendor shall also maintain Employers Liability Insurance Coverage with limits of at least:
    - (i) Bodily Injury by Accident • \$500,000 each accident; and
    - (ii) Bodily Injury by Disease • \$500,000 each employee.

3. Commercial General Liability Insurance. Vendor shall provide Commercial General Liability Insurance (1996 ISO Occurrence Form or equivalent) which shall include, but need not be limited to, coverage for bodily injury and property damage arising from premises and operations liability, products and completed operations liability, personal injury liability, fire-legal coverage and contractual liability. The Commercial General Liability Insurance shall provide coverage at minimum the following limits:

<u>Coverage</u>	<u>Limit</u>
Personal Injury	\$1,000,000 per Occurrence
Contractual	\$1,000,000 per Occurrence

4. Commercial Automobile Liability Insurance. Vendor shall provide Commercial Automobile Liability Insurance, which shall include coverage for bodily injury and property damage arising from the operation of any owned, non-owned or hired automobile. The Commercial Automobile Liability Insurance Policy shall provide not less than \$ 1,000,000 Combined Single Limits for each occurrence.
5. Commercial Umbrella Liability Insurance. Vendor shall provide a Commercial Umbrella Liability Insurance Policy to provide excess coverage above the Commercial General Liability, the Commercial Automobile Liability, and the Workers' Compensation and Employers' Liability to satisfy the minimum limits set forth herein. The minimum amount of Umbrella limits required above the coverages and minimum limits stated above shall be:
  - \$ 1,000,000 per Occurrence
  - \$ 1,000,000 Annual Aggregate

## **INDEMNIFICATION**

The final contract shall contain the following indemnification clause:

Vendor shall indemnify and hold harmless the State of Georgia and its divisions, departments, agencies, and instrumentalities of all branches of government of the State (including the State Tort Claims Trust Fund and any other insurance or self-insurance funds of the State), and all of their officers, directors, members, employees, staff, volunteers, agents and other representatives which would include the CCJ (hereinafter collectively referred to as the "Indemnitees") from and against any and all, and will pay to the Indemnitees the amount of any and all, claims, demands, liabilities, losses, costs, damages (including incidental and consequential damages and double and treble damages) penalties, fines, expenses, or other liabilities (including costs of investigation and defense, court costs, costs of settlement and attorneys' fees) or diminution of value, whether or not involving a third-party claim (collectively, for purposes of this Article, "Damages"), arising, directly or indirectly, out of, with respect to, or in connection with the services provided in this Request for Proposal.

## **SUB-CONTRACTING**

Sub-contracting is allowed and encouraged to ensure that CCJ receives complete proposals from the research vendors most qualified to provide the services set forth herein. CCJ encourages research vendors to negotiate with potential subcontractors and to submit proposals for all portions of this request. CCJ shall approve sub-contracts or delegation of the research vendor's authority herein prior to the research vendor's execution of the sub-contract with the sub-contractor. The successful research vendor shall be responsible for the performance of any sub-contractor or other duties that are delegated and all provisions of the CCJ contract.

If one research vendor does not meet all of the required qualifications, CCJ reserves the right to issue multiple contracts and to notify apparent winning research vendors of the proposed award of multiple contracts. CCJ reserves the right to encourage multiple apparent winning research vendors to consider subcontracting prior to awarding a contract.

## **OFFEROR'S CONFERENCE**

**ATTENDANCE AT THE OFFEROR'S CONFERENCE IS MANDATORY FOR ANY RESEARCH VENDOR WHO WISHES TO SUBMIT A PROPOSAL.**

CCJ shall host an Offerors' Conference for all research vendors who wish to submit proposals in response to this request. From the issue date of this request

until a research vendor is selected and the selection is announced, research vendors are not allowed to communicate orally for any reason with any CCJ staff, CCJ Committee Members, or their designees except during the Offerors' Conference. For violation of this provision, CCJ shall reserve the right to reject the proposal of the offending research vendor. All questions concerning this Request for Proposal must be submitted in writing via e-mail to the e-mail address of the CCJ contact person listed below on or before 5:00 p.m. on July 20, 2007. CCJ staff will only confirm the receipt of the e-mail via e-mail. No questions other than written questions will be accepted. No response other than responses provided during the Offeror's Conference will be binding upon CCJ.

**The Offeror's Conference shall be held on August 14, 2007, beginning at 10:00 a.m. at the State Bar of Georgia, located at 104 Marietta Street, Atlanta, Georgia 30303 in the President's Room of the 3<sup>rd</sup> Floor Conference Center. Research vendors may participate in the conference call via telephone conference.**

**To participate in the Offeror's Conference via telephone, please call (866) 257-0470. The Meeting number is \*5278768\*. Please note that you must use the star (\*) key before and after the meeting number.**

## **FORMAT FOR PROPOSALS**

Proposals must be submitted in one document that contains three separate sections: (1) a Research Vendor Qualifications section; (2) a Technical Proposal section; and (3) a Cost Proposal section. The Research Vendor Qualifications section shall contain the information set forth in this Request above. The Technical Proposal section shall include detailed information relative to how you propose to accomplish the tasks described in the Description of Legal Needs Survey section of this Request above. The Technical Proposal section shall not include any cost figures.

The Cost Proposal section shall include information as requested herein relative to the costs proposed to accomplish the proposed project.

Research vendors are asked to provide a menu of FIXED costs from which CCJ may choose. The proposal should include all costs, including any indirect costs. This menu of costs should include:

- A core telephone survey showing options for various sample sizes (e.g., 800, 1,000 and 1,200 interviews) with a highly representative sample of the population of low-income households in Georgia with incomes of not more than

150% of the Federal Poverty Level. Please explain tradeoffs between costs and standard error for the total sample and subgroups;

- An optional add-on telephone survey of not less than 200 persons with incomes in the range of 150% to 300% of the Federal Poverty Rate. Please explain tradeoffs between costs and standard error for the total sample and subgroups;
- Qualitative research, including focus groups and personal interviews, among supplemental hard-to-reach groups. Please provide your recommendation for the most appropriate methodology(ies) for obtaining input from these populations based on the guidelines provided above, and the costs for each methodology that you propose based on your assumptions;
- Personal Interviews, which shall be videotaped, of approximately 24 to 30 selected individuals identified from the telephone survey for a more in-depth interview of approximately 20 to 30 minutes;
- Assistance in the design of a survey instrument questionnaire for an Internet Survey among legal aid providers, social service agencies, faith-based groups, other community organizations, and court personnel; and assistance in analyzing and interpreting the data collected; and
- A telephone survey of approximately 300 attorneys, regarding their participation in pro bono services. The sample should contain completed responses from 100 attorneys who have participated in pro bono service and from 200 attorneys who have not participated in pro bono services. Please explain tradeoffs between costs and standard error for the total sample and subgroups.

Research vendors shall specify in the menu of cost for each of the survey components a breakdown of the cost per completed interview or focus group, as appropriate. In addition, for the qualitative research, research vendors shall itemize travel costs, staff costs, and any other costs the research vendor anticipates incurring, not specifically listed above. Indirect costs shall also be itemized separately.

CCJ recognizes that the cost of the study will depend on a variety of factors, including but not limited to:

- Number of telephone interviews required to conduct subgroup analysis within acceptable margins of error;
- Sampling requirements (e.g., the incidence of the qualified population among selected census tracts/blocks by income predictor);

- Average length of interviews (in order to preserve data quality every effort must be made to obtain required information in the minimal amount of time; a 15-minute interview is the optimal maximum length);
- Number of supplemental groups selected for participation in the survey, number of interviews within each group contacted, how they are contacted, qualifications of interviewers/specialists;
- Extent of analysis and report.

The Cost Proposal section shall follow the format below. If a cost is not applicable, please so indicate. If a research vendor does not wish to bid on a particular part of the request, please so indicate.

### **COST PROPOSAL**

**Total Contract Value for ALL Requirements \$\_\_\_\_\_\*\***  
**\*\*The Total Contract Value should include all indirect costs**

1. Total Cost per completed Interview for Low-Income Households Telephone Survey \$
  - a. Cost per completed interview for Low-Income Households Survey \$
  - b. Indirect Costs for Low-Income Households Survey \$
  - c. Other Costs for Low-Income Households Survey (please give examples of the types of costs included) \$
2. Total Cost per completed Interview for Moderate-Income Households Telephone Survey \$
  - a. Cost per completed interview for Moderate-Income Households Survey \$
  - b. Indirect Costs for Moderate-Income Households Survey \$
  - c. Other Costs for Moderate-Income Households Survey (please give examples of the types of costs included) \$

3. Total Cost for Focus Groups of selected client populations in four different geographic regions of the State selected by CCJ. \$
  - a. Cost per focus group for focus groups of selected client populations \$
  - b. Indirect Costs for focus groups of selected client populations \$
  - c. Travel Costs for focus groups of selected client populations \$
  - d. Staff Costs for focus groups of selected client populations \$
  - e. Other Costs for focus group of selected client populations (please give examples of the types of costs included) \$
  
4. Total Cost per completed Interview for Personal Face-to-Face Interviews of Selected Individuals from the Telephone Survey (not more than 30) \$
  - a. Cost per completed interview of Selected Individuals \$
  - b. Indirect Costs for interview of Selected Individuals \$
  - c. Travel Costs for interview of Selected Individuals \$
  - d. Staff Costs for interview of Selected Individuals \$
  - e. Costs for Videotaping approximately 30 Interviews \$
  - f. Other Costs for interview of Selected Individuals (please give examples of the types of costs included) \$
  
5. Total Cost per completed Interview for Personal Face-to-Face Interviews of Individuals that cannot be reached by telephone (approximately 200 completed interviews) \$
  - a. Cost per completed interview of Hard-to-Reach Individuals \$
  - b. Indirect Costs for interview of Hard-to-Reach Individuals \$
  - c. Travel Costs for interview of Hard-to-Reach Individuals \$
  - d. Staff Costs for interview of Hard-to-Reach Individuals \$
  - e. Other Costs for interview of Selected Individuals (please give examples of the types of costs included) \$

6. Total Cost per completed Interview for assistance with the design and analysis of an Internet Survey of legal aid providers, social service agencies, faith-based groups, and court personnel \$
  - a. Design and Analysis Costs \$
  - b. Indirect Costs for Internet Survey of Providers, etc. \$
  - c. Other Costs for Internet Survey of Providers, etc. (please give examples of the types of costs included) \$
  
7. Total Cost for Focus Groups of legal aid providers, social service agencies, faith-based groups, and court personnel \$
  - a. Cost per focus group of legal aid providers, etc. \$
  - b. Indirect Costs for focus group of legal aid providers, etc. \$
  - c. Travel Costs for focus group of legal aid providers, etc. \$
  - d. Staff Costs for focus group of legal aid providers, etc. \$
  - e. Other Costs for focus group of legal aid providers, etc. (please give examples of the types of costs included) \$
  
8. Total Cost per completed Interview for Attorney Pro Bono Survey \$
  - a. Cost per completed interview for Attorney Pro Bono Survey \$
  - b. Indirect Costs for Attorney Pro Bono Survey \$
  - c. Other Costs for Attorney Pro Bono Survey (please give examples of the types of costs included) \$

**BE CAREFUL NOT TO QUALIFY YOUR COST PROPOSAL WITH “IF...THEN” STATEMENTS. A QUALIFIED COST PROPOSAL RESPONSE WILL BE REJECTED AND YOUR PROPOSAL WILL NOT BE FURTHER CONSIDERED!**

**AS STATED ABOVE, REMEMBER THAT RESEARCH VENDORS ARE SOLELY RESPONSIBLE FOR THE COSTS ASSOCIATED WITH THE USE OF ANY INCENTIVES PROVIDED TO FOCUS GROUP PARTICIPANTS OR INTERVIEW SUBJECTS.**

## **FINANCIAL CAPABILITY**

CCJ is concerned about research vendors' financial capability to perform. Therefore, please provide your most recent financial statements and a copy of your most recent audit to allow the Evaluation Committee (described below) to determine your financial capability. As detailed financial data is generally proprietary and bidders do not wish such information to be released to the public, CCJ reserves the right to perform additional due diligence in this area, at the sole discretion of the CCJ, prior to award of any contract. CCJ further reserves the right to require the apparent winning research vendor(s) to provide a performance bond or a bank letter of credit.

## **EVALUATION CRITERIA**

CCJ shall select an Evaluation Committee and that Committee, with the assistance of advisors from the AOC, will review all proposals received and determine a ranking. Initially, CCJ will screen each proposal for completeness to ensure that all mandatory requirements are addressed satisfactorily. CCJ will then further evaluate proposals that satisfy the initial screening to determine the quality and completeness of the technical proposal as it addresses each requirement of this request. CCJ will evaluate technical quality and completeness based on criteria as follows: (1) Organizational capacity and structure; (2) Staff experience; (3) Proposed staffing of project; (4) Questionnaire Administration/Sample Management; (4) Data Management; (5) Quality assurance and confidentiality; (6) Training; (7) Focus group Administration/Management; (8) Face-to-Face Interview Administration/Management; (9) Experience with government in Georgia; and (10) Costs. The Evaluation Committee will assign a weight to each of the criteria prior to reviewing research vendor proposals. After the Evaluation Committee reviews the proposals based on the above listed criteria as weighted, the Evaluation Committee will score the proposals and select an apparent winning research vendor(s).

**[CONTINUED ON THE NEXT PAGE]**

## **SUBMISSION OF PROPOSALS**

Proposals shall not exceed 50 pages in length. Please submit one original and 10 copies of your proposal so that it is received on or before September 7, 2007, not later than 5:00 p.m. to the person at the address as follows:

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