

REQUEST FOR PROPOSAL
LEGAL REPRESENTATION FOR RESPONDENTS IN GUARDIANSHIP CASES
GRAMP (Guardianship Reporting and Monitoring Program)
Solicitation# AOC27001

PURPOSE OF REQUEST FOR PROPOSAL (RFP)

The purpose of this request for proposal is to enter into a contract with a qualified firm or agency for a pilot project to provide legal representation to respondents in guardianship petitions filed statewide. These cases will be assigned after the statutory 60 days have passed to allow an attorney volunteer for the case through the GSP (Guardianship Signature Program). The (GSP) was established by the Utah State Bar to provide a mechanism for attorneys to volunteer to fill this mandate.

It is anticipated that this RFP will result in a contract award to a single offeror. There will be two phases to this RFP. All vendors who score 51 points or higher out of 85 points possible on the attached evaluation scoresheet will qualify for an interview in the second phase. The winning bidder will be the highest score after the scores calculated in phase two are added to the scoresheet.

This RFP is designed to provide interested offerors with sufficient basic information to submit proposals meeting minimum requirements but is not intended to limit a proposal's content or exclude any relevant or essential data. Offerors are at liberty and are encouraged to expand upon the specifications to evidence service capability under any agreement.

BACKGROUND

Utah Code 75-5-303(2) mandates that respondents in guardianship cases must have legal representation, appointed by the court, unless specific conditions are met. Utah Code 75-5-303(6)(e) mandates appointment of a court visitor in lieu of an attorney if specific conditions are met.

The Court Visitor Program (CVP) was established as a means of utilizing trained volunteers to serve as special appointees of the court in guardianship cases, including those where an attorney has been waived per statute. Both these programs are part of the Guardianship Reporting and Monitoring Program (GRAMP) at the Administrative Office of the Court (AOC).

GSP attorneys may seek reimbursement from the respondent, based on the Modest Means fee scale and facilitated by the Utah State Bar, in their specific cases. Apart from this possible reimbursement, GRAMP lacked funds to incentivize legal representation in mandatory guardianship cases and relied solely on volunteerism to fulfill the statutory mandate.

The Judicial Council has provided funding for this pilot program in which a firm or agency will be incentivized to accept guardianship cases statewide when appointed by the court. The (GSP) receives approximately 130 requests from all the districts and each year that are not eligible for an attorney waiver, as per statute. These are cases where judges would either ask for a court visitor, even though statute requires the appointment of an attorney; or the judge would move forward with the appointment, without a court visitor or attorney.

These 130 requests are the base number to be included in the pilot program, with each case averaging 5-15 hours of work to be completed by an attorney.

The average pay that an attorney working for the State of Utah receives is \$100 hourly. With 130 cases needing an average of 10 hours per case, that equals approximately 1300 hours that could be billed by the attorney under a pilot program. This cost is non-negotiable, and proposals should focus on the skills and abilities to efficiently and effectively represent respondents in guardianship cases.

ISSUING OFFICE AND RFP REFERENCE NUMBER

The State of Utah Administrative Office of the Courts (AOC) is the issuing office for this document and all subsequent addenda relating to it, on behalf of GRAMP.

RFP Reference Number: **AOC27001**

SUBMITTING YOUR PROPOSAL

Proposals must be received by the due date and time listed on the Euna Bonfire U3P Utah Procurement Place website, currently:

Wednesday, September 16, 2026 at 3:00 P.M (mdt).

Please refer to the U3P website for any modifications. Proposals received after the deadline will be late and ineligible for consideration.

The preferred method of submitting your proposal is electronically through the Euna Bonfire U3P Utah Procurement Place. However, if you choose to submit hard copies, one original and (3) three identical copies of your proposal must be received at the Administrative Office of the Courts, Attn: Dustin Treanor, 450 South State, PO Box 140241, Salt Lake City, Utah 84114-0241 prior to the posted due date and time. Hard copies must list the Bid number and "Private Bid" on the envelope.

When submitting a proposal electronically through the Euna Bonfire U3P Utah Procurement Place, please allow sufficient time to complete the online forms and upload documents. The solicitation will end at the closing time listed on Euna Bonfire U3P. If you are in the middle of uploading your proposal at the closing time, the system will stop the process, and your proposal will not be received by the system.

Electronic proposals may require uploading of electronic attachments. The Euna Bonfire U3P Utah Procurement Place's site will accept a wide variety of document types as attachments. However, the submission of documents containing embedded documents (zip files), mov, wmp, and mp3 files are prohibited. Cost should be on a separate attachment.

LENGTH OF CONTRACT

The contract resulting from this RFP will be for a period of (1) year. The contract may be extended beyond the original contract period for up to (1) additional year, totaling (2) years at the Judicial Council's discretion and by mutual agreement.

PRICE GUARANTEE PERIOD

All pricing will be guaranteed for the first year. Price adjustments will not be considered prior to that date. Following the guarantee period, any request for price adjustment must be for an equal guarantee period and must be made at least 30 days prior to the effective date. Requests for price adjustment must include sufficient documentation supporting the request. Any adjustment or amendment to the contract will not be effective unless approved by the Utah State Courts. As stated, GRAMP anticipates that 130 cases will require legal representation, with each case averaging 5-15 hours of work necessary to resolve the case. The average pay that an attorney working for the State of Utah receives is \$100 hourly. With 130 cases needing an average of 10 hours per case, that equals approximately 1300 hours that could be billed by the attorney under a pilot program. This cost is non-negotiable, and proposals should focus on the skills and abilities to represent respondents in guardianship cases.

CONTRACT TERMS AND CONDITIONS

Any contract resulting from this RFP will include, but not be limited to, the attached terms and conditions.

QUESTIONS

All questions must be submitted through the EUNA BONFIRE U3P UTAH PROCUREMENT PLACE website. Answers will also be given via the U3P website.

INTERVIEWS WITH OFFERORS

All vendors who score 51 points or higher out of 85 possible points on the attached evaluation scoresheet will qualify for an interview in the second phase. The evaluation committee reserves the right to adjust Phase I scores after the interview with proper justification in the public RFP file. The winning bidder will be the highest score after the scores are calculated in the second phase are added to the scoresheet.

PROTECTED INFORMATION

The Utah Rules of Judicial Administration provide that the following business records are protected:

- (1) trade secrets as defined in Utah Code § 13-24-2,*
- (2) commercial information or non-individual financial information obtained from a person if:*
 - (a) disclosure of the information could reasonably be expected to result in unfair competitive injury to the person submitting the information or would impair the ability of the governmental entity to obtain necessary information in the future;*
 - (b) the person submitting the information has a greater interest in prohibiting access than the public in obtaining access; and*
 - (c) the person submitting the information has provided the governmental entity with the information specified in Utah Code Section 63G-2-309; and*
- (3) records the disclosure of which would impair governmental procurement proceedings or give an unfair advantage to any person.*

To protect information under a claim of business confidentiality, the Offeror must provide a written claim of business confidentiality at the time the proposal is provided to the State *and* include a concise statement of reasons supporting the claim of business confidentiality (Utah Code Section 63G-2-309(1)).

A claim of business confidentiality may be appropriate for information such as client lists and non-public financial statements. Pricing and service elements may not be protected. An entire proposal may not be protected under a claim of business confidentiality. The claim of business confidentiality must be submitted with your proposal.

To ensure the information is protected, please clearly identify in the Executive Summary and in the body of the proposal any specific information for which the offeror claims business confidentiality protection.

DETAILED SCOPE OF WORK

The goal of the Guardianship Reporting and Monitoring Program (GRAMP) is to provide respondents in guardianship proceedings with statutorily required legal representation. GRAMP will also continue to use the GSP to find volunteer attorneys, and the CVP when a court visitor is appointed. Cases will only be funneled to the Offeror upon official referral by GRAMP, confirming that the case has remained open without a volunteer attorney match for a minimum of 60 days. The winning Offeror will serve as the designated Secondary Failsafe Provider for the GSP.

Respondents in guardianship cases that require legal representation vary in age, race and gender, but most may be disabled or otherwise impaired in some way. Due to this, Offerors must show competency in guardianship law and procedures. This can be done by certifying that they are competent in these matters, or by completing the training course offered by GRAMP and providing a certificate of completion from that course to the GRAMP administrator. Offerors must be admitted to practice law in Utah and a member of the Utah State Bar in good standing.

As stated, GRAMP anticipates that 130 cases will require legal representation, with each case averaging 5-15 hours of work necessary to resolve the case. The average pay that an attorney working for the State of Utah receives is \$100 hourly. With 130 cases needing an average of 10 hours per case, that equals approximately 1300 hours that could be billed by the attorney under a pilot program. This cost is non-negotiable, and proposals should focus on the skills and abilities to represent respondents in guardianship cases.

Program Objectives for the Offeror:

1. Provide legal representation for respondents in guardianship cases as appointed by the court. Cases will be screened by the GRAMP administrator after the statutory 60 days has passed to allow for volunteers through the GSP. As a result, cases will require navigation of guardianship statutes, including mediation. The Offeror's ability to provide this will be examined.
2. Legal representation of the respondent must continue until the case is resolved, even if that time exceeds the average of 10 hours as stated.
3. The agency and / or firm may choose the attorney to fill the appointment. They will track the hours spent working on a case and submit an invoice for each separate case to the GRAMP administrator.
4. The agency and / or firm will provide all office and technical support to any attorney involved in the program. Any need for interpreter services will be provided by the AOC, for both court hearings and office meetings.

PROPOSAL REQUIREMENTS AND QUALIFICATIONS

1. Any attorney who the Offeror would use in the pilot program must be an active member of the Utah State Bar.
2. Any attorney who the Offeror would use in the pilot program must either certify to the GRAMP administrator that they are competent in these matters or complete the four-part training course offered by GRAMP. If the GRAMP training is completed, a certificate of completion from that training must be provided.
3. Provide legal representation to the respondent as needed, even if the hours exceed the average number of hours initially contemplated.
4. The Offeror must agree to utilize the standard GRAMP reporting forms and data portals, ensuring judges see no operational difference between a GSP volunteer and a pilot program attorney. Invoices must be submitted to the GRAMP administrator on a monthly basis that includes data requirements given by the GRAMP administrator to achieve the program objectives

PROPOSAL RESPONSE FORMAT

All proposals must include:

1. **RFP Form.** The State's Request for Proposal form completed and signed.
2. **Executive Summary.** The one- or two-page executive summary is to briefly describe the Offeror's proposal. This summary should highlight the major features of the proposal. It must indicate any requirements that cannot be met by the offeror. The reader should be able to determine the essence of the proposal by reading the executive summary. Protected information requests should be identified in this section.
 - a. An assurance that the Offeror can meet all requirements.
 - b. The Offeror's relevant experience, including the relevant experience of any attorney who may be involved in the pilot program.
 - c. The proposed strategy of providing legal representation to guardianship respondents as described including data tracking and invoicing processes.
 - d. Assurances that the attorneys who may be involved in the pilot program are knowledgeable in guardianship and conservatorship practices.
 - e. Assurance that the attorneys who may be assigned to respondents who are disabled in some way will have the skills available to advocate for the respondents' best interests, even if they cannot directly ask the client what they want. They must do their due diligence to ascertain what the client would want if they could communicate. They also must see a case through, even if the best course of action for their client takes them beyond the assumed billable hours.

3. **Detailed Response.** This section should constitute the major portion of the proposal and must contain at least the following information:

- a. A list of all attorneys that may be used in the pilot program, with a brief summary of work experience. The Offeror must also indicate that the attorneys are knowledgeable in guardianship matters, either by written certification or a certificate of completion of the GRAMP training course. Access to the training courses can be provided by the GRAMP administrator. The response should also detail how experienced the attorneys involved in the pilot program are with working with respondents that may be disabled or otherwise impaired in some way.
- b. To ensure that performance management remains with the Offeror during each attorney's time in the pilot program, the Offeror must confirm that all listed attorneys will be monitored against internal performance expectations and requirements.
- c. The Offeror must provide a list of objectives and methodologies they will impose, in line with feedback from the GRAMP administrator, to meet program goals. This could include criteria to consider when decisions are made regarding which attorney should take on a case in the pilot program.
- d. A description of how the Offeror and each attorney involved in the pilot program will determine if a conflict of interest exists with themselves or the Offeror. This includes reporting conflicts to the GRAMP administrator, how the attorney will be screened off from any other attorneys, and how the attorney will maintain objectivity and confidentiality around the conflict.
- e. To ensure that the respondents in the assigned cases get immediate assistance, the Offeror should describe any processes they can implement to help the attorney assigned to the case can immediately begin work.
- f. A description of the Offeror's administrative ability to provide clerical and technical support to the attorneys involved in the pilot program. This would include a list of personnel in a supportive position who may assist the attorney while they are representing respondents in pilot program cases.

4. **Examples of Past Work/References:** With the list of attorneys that may be utilized in this program, the Offeror must also submit a total of 3 cases per attorney. These three cases must show that the attorney provided representation to a protected person and /or respondent in a guardianship case and completed the case.
5. **Cost.** Costs are capped at \$130,000 annually for 130 cases averaging 10 hours per case, with each case billed at \$100 per hour. Each Offerer must show a comprehensive plan detailing efficiencies to maximize the time spent on each case. This would include showing how many hours could be contributed toward the pilot program using senior level attorneys and paralegal support.

PROPOSAL EVALUATION CRITERIA

A committee will evaluate proposals against the following weighted criteria. Each area of the evaluation criteria must be addressed in detail in proposal.

PHASE I (Offerors must score at least 51 out of 85 points to move to Phase II)

<u>WEIGHT</u>	<u>EVALUATION CRITERIA</u>
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25 %	Capacity and Scalability
20 %	Competency and Qualifications
25 %	Guardianship and Disability Law Experience
15 %	References and Rating Prior Guardianship Cases

PHASE II (for those who score at least 51/85 points in Phase II)

<u>WEIGHT</u>	<u>EVALUATION CRITERIA</u>
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15%	Interview
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LEGAL REPRESENTATION FOR RESPONDENTS IN GUARDIANSHIP CASES

Administrative Office of the Courts

SOLICITATION# AOC27001

RFP EVALUATION SCORESHEET

Firm Name: _____

Evaluator: _____

Date: _____

Score will be assigned as follows:

0 = Failure, no response

1 = Poor, inadequate, fails to meet requirement

2 = Fair, only partially responsive

3 = Average, meets minimum requirement

4 = Above average, exceeds minimum requirement

5 = Superior

	Points Possible	Score	Weight	Points
PHASE ONE	-----			
1. Capacity and Scalability (25 points possible)		----	----	----
Soundness of operational plan triaging and evaluating assigned cases.	10 points possible		x2	
Is there a dedicated pool of attorneys who can give immediate assistance and immediately begin work on an assigned case.	10 points possible		x2	
Ability to complete to disposition any case that goes beyond the average number of 10 hours.	5 points possible		x1	
2. Competency and Qualifications (20 points possible)		----	----	----
What is the work experience of attorneys who would be assigned cases?	10 points possible		x2	
Are there senior attorneys who can lend knowledge and expertise?	10 points possible		x2	
3. Guardianship and Disability Law Experience (25 points possible)		----	----	----
Do the attorneys have experience working with disabled or otherwise impaired respondents?	15 points possible		x3	
Knowledge and history with the GRAMP (GSP, CVP, WINGS).	10 points possible		x2	
4. References and Rating Prior Guardianship Cases (15 points possible)		----	----	----
Soundness of detailed plan describing how the Offeror will check for conflicts and possible mitigation.	5 points possible		x1	
Submit list of cases that the firm / agency has completed successfully, noting which attorney worked on each case.	10 points possible		x2	
FINAL PHASE ONE SCORE All proposals that score 51 points or more in Phase One move on to the interview in Phase Two.	85 points possible	-----	-----	
PHASE TWO (only for those who scored over 51 points in Phase One)	-----	----	----	----
Interview Score (15 Points Possible)	15 points possible	----	----	
FINAL EVALUATION POINTS	100 points possible	----	Total	