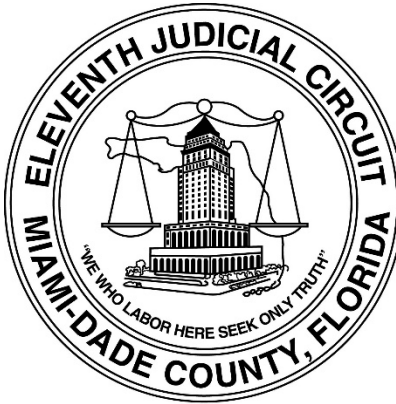


**ELEVENTH JUDICIAL CIRCUIT OF FLORIDA  
GUARDIANSHIP EDUCATION COURSE  
REQUEST FOR QUALIFICATIONS (“RFQ”) # 2020-01**



**Proposals are due no later than  
Tuesday, October 27, 2020 at 5:00 p.m. (EST)  
to**

**Maria Rosso  
Director of Probate**

**at**

**[GuardianshipRFQ@jud11.flcourts.org](mailto:GuardianshipRFQ@jud11.flcourts.org)**

**This is an open RFQ. After the initial date above, proposals will be accepted on a rolling basis and reviewed at least annually by July 31st of each year.**

**PLEASE NOTE: THIS REQUEST FOR QUALIFICATIONS IS SUBJECT TO ARTICLE 1, SECTION 24 OF THE FLORIDA CONSTITUTION AND FLORIDA RULE OF JUDICIAL ADMINISTRATION 2.420, GOVERNING PUBLIC ACCESS TO JUDICIAL BRANCH RECORDS.**

**GUARDIANSHIP EDUCATION COURSE FOR  
THE ELEVENTH JUDICIAL CIRCUIT COURT OF FLORIDA  
RFQ #2020-01**

**1. BACKGROUND**

The State of Florida is divided into 20 judicial circuits, or areas of jurisdiction, which encompass the Circuit and County Courts of the Florida State Courts System. The Eleventh Judicial Circuit of Florida, serving Miami-Dade County, is the largest in the state and one of the largest trial courts in the nation. Its 126 Circuit and County Court judges serve a population of over two million in a 2,000 square mile area. 81 Judges preside in six (6) Divisions of the Circuit Court and 45 Judges preside in three (3) Divisions of the County Court. The Eleventh Judicial Circuit has been innovative in implementing numerous programs and services to assist in effective case management and resolve problems which impact the Court and the community. Examples of such programs which were pioneered in Miami-Dade County and which are now in effect in other circuits statewide are: Drug Court (first in the nation), the Domestic Violence Division, Veteran's Treatment Court, Criminal Mental Health Program, parenting/child education classes, and traffic court magistrates.

The Probate Division has jurisdiction over a broad category of cases including mental health, guardianship, estates and trusts. Five circuit judges and one general magistrate are assigned to hear cases in the Circuit Probate Division.

**2. PURPOSE**

The purpose of this RFQ is to solicit proposals in accordance with established procedures to meet the requirements of developing a list of court-approved organizations to provide instruction and education for Guardians within 4 months of appointment, as set forth in section 744.3145, Florida Statutes.

**3. INQUIRIES**

- a. Any questions or requests for additional information regarding this RFQ shall be **in writing, via email**, directed to:

Maria Rosso  
Director of Probate  
E-mail: GuardianshipRFQ@jud11.flcourts.org

- b. Any clarification or additional information that may substantially affect the outcome of this RFQ will be provided in the form of a written addendum and will be posted on the Court's web site [www.jud11.flcourts.org](http://www.jud11.flcourts.org). If necessary, clarifications or additional information shall be issued by Court Administration.

Unless issued in writing by Court Administration, nothing shall be binding upon this RFQ.

#### **4. SCHEDULE OF EVENTS**

Listed below are the dates and times by which stated actions must be taken or completed. If Court Administration determines, in its sole discretion, that it is necessary to change any of these dates and times, it will issue an Addendum to this RFQ. All listed times are Eastern Daylight Savings Time:

<b>Advertisement of RFQ</b>	<b>Friday, October 2, 2020</b>
<b>RFQ Submission Deadline</b>	<b>Friday, October 30, 2020 at 5:00 p.m.</b>
<b>RFQ Review Committee Meetings</b>	<b>Monday, November 9, 2020 at 3:00 p.m.</b>
<b>RFQ Recommendations to Chief Judge</b>	<b>Tuesday, November 17, 2020</b>
<b>Providers meeting the minimum qualifications are notified</b>	<b>Monday, November 30, 2020</b>
<b>Court-Approved List Published</b>	<b>Monday, November 30, 2020</b>

#### **5. SCOPE OF WORK**

The approved Provider shall offer Guardianship Education courses at least bi-monthly (every other month), that meets the requirements set forth in section 744.3145, Florida Statutes, and make available proof of the Guardian's completion of the course.

#### **6. MINIMUM QUALIFICATIONS**

Proposed Providers must meet the following minimum qualifications:

- a. Provide 8 hours of virtual or in person instruction for Court appointed non-professional guardians (other than a parent who is the guardian of the property of a minor) which covers:
  1. Legal duties and responsibilities of the guardian;
  2. Rights of the ward;
  3. Availability of local resources to aid the ward; and
  4. The preparation of annual accountings and annual guardianship annual plans, including financial accounting for the ward's property.
- b. Provide 4 hours of virtual or in person instruction for Guardians of the property of a minor, that covers:
  1. Legal duties and responsibilities of the guardian of the property;
  2. The preparation of the initial inventory and annual guardianship accountings for the ward's property; and
  3. Use of Guardianship Program.
- c. Provide courses at least bi-monthly (every other month), with flexibility to provide the course on weekdays and on weekends.
- d. Provide courses in English, Spanish, and Creole.
- e. Make all courses ADA compliant.
- f. Courses must be taught by Professional Guardians who have been licensed and practicing for a minimum of five (5) years, or an attorney practicing in the area of guardianship for a minimum of five (5) years.
- g. Proposed Providers must provide a sliding fee schedule for indigent Guardians.
- h. Program must provide verified certificate that non-professional guardian has completed course.
- i. Provide the Court with an annual certificate of compliance indicating that proposed Provider continues to meet the minimum requirements set forth in this RFQ.

## **7. REMOVAL from COURT-APPROVED LIST for NON-COMPLIANCE**

The Court reserves the right to remove a Provider from the court-approved list based on the Provider's failure to meet the minimum requirements set forth in this RFQ.

## **8. SUBMITTAL REQUIREMENTS**

- a. Proposals shall be typed on white letter-size paper and each element of the RFQ shall be addressed in a clear, concise manner. Each element shall be labeled and indexed. Proposals shall be submitted electronically with the number of attached pages identified in the body of the email.
- b. Proposals shall be submitted to:

Maria Rosso  
Director of Probate

at  
GuardianshipRFQ@jud11.flcourts.org

**Subject line: "RFQ #2020-01, GUARDIANSHIP EDUCATION COURSE"**

by  
**Friday, October 30, 2020 at 5:00 p.m. (EST)**

- c. Prospective Provider will receive an automatic reply acknowledging receipt of the email, followed by another email within 5 business days confirming the number of pages received.
- d. Any proposals received after the advertised deadline will not be considered until the next July.
- e. Failure to submit all required documents will be deemed nonresponsive and the proposal will not be considered.
- f. Proposal production costs are the responsibility of the proposed Provider.

## **9. PROPOSAL CONTENT**

a. Proposals shall contain, at a minimum, the following information:

### **i. Proposer Information:**

- (1) Proposer's official business name, address (both physical and mailing), telephone and fax numbers; type of business such as sole proprietorship, partnership, or corporation, including the State of incorporation;
- (2) Length of time in business;
- (3) Location(s) of business operations;
- (4) Location(s) that the courses will be offered (including the name of the platform for virtual courses) and parking accessibility for physical course locations;
- (5) Proposed course frequency;
- (6) Languages in which the courses will be offered;
- (7) Qualifications and experience of course faculty(s) and/or key personnel;

(8) ADA Compliance;

(9) Description of support staff;

(10) Dates of prior contracts, if any, with the Eleventh Judicial Circuit. Include length of time and reason for termination; and

(11) Details of any change in ownership, if prior owner was known to have a contract with the Eleventh Judicial Circuit.

- ii. **Statements:** Include a statement indicating an understanding of the scope of services and the requirements thereof.
- iii. **Technology Plan:** Provide a statement of the proposed Provider's ability to utilize technology to meet the statutory requirements for providing an online Guardianship Education Course.
- iv. **Quality Assurance Statement:** Include the proposed Provider's statement of commitment to quality assurance; the proposed Provider's capability and plan to ensure that Guardians are engaged in the course. For example, explain measures that are in place for the Guardians' engagement and interaction during online and in-person courses.
- v. **Conflict Disclosure:** Include the name(s) of any employee or officer of the Eleventh Judicial Circuit Court of Florida who owns, directly or indirectly, an interest of 5% or more in the company. Also, include the name(s) of any employee, officer, or agent of the firm that has any conflict of interest associated with this project. See Conflict of Interest Disclosure Form, appended hereto as Exhibit "A."
- vi. **References:** Include the name, address, e-mail address, and telephone number of at least three (3) clients for whom similar services are performed, as well as the duration of time services were performed.
- vii. **Fee Structure:** Include proposed fees for the following:
  - 4 hour Guardian Education Course (including sliding fee scale for indigent guardians)
  - 8 hour Guardian Education Course (including sliding fee scale for indigent guardians)
- viii. **Proof of Completion:** Proposed certification/verification process upon the Guardians' completion of the course.

## **10. EVALUATION OF PROPOSALS**

**Review Committee:** A Review Committee, consisting of 3-6 members will evaluate all proposals. The Review Committee reserves the right to request interviews of any or all proposed Providers as may be necessary toward a fair and equitable proposal evaluation. The Review Committee will make recommendations to the Chief Judge.

## **11. ADDENDA**

Any clarifications or additional information that may substantially affect the outcome of this RFQ will be provided in the form of a written addendum. Any addendum will be posted on the "Probate Division" page which can be accessed from the Eleventh Judicial Circuit's website at [www.jud11.flcourts.org](http://www.jud11.flcourts.org) under section titled "**ADDENDA.**"

## **12. PROTEST PROCEDURES**

Judicial branch purchasing, including procedures and proceeding relating to bid protests, are governed by the State Courts System Purchasing Directives. The judicial branch is not encompassed within chapter 287, Florida Statutes, statutory bid requirements, or section 120.57(3), Florida Statutes, administrative proceeding relating to protests to contract solicitations or awards. The proposer is hereby placed on notice requirements specific to the judicial branch, as follows:

1. Judicial branch purchasing requirements, as specified in the State Courts System Purchasing Directives, supersede and control over any General Conditions stated in the Request for Qualifications.
2. State Courts System Purchasing Directives can be accessed through the Florida Courts web site at: [www.flcourts.org](http://www.flcourts.org): Judicial Administration, "Purchasing."
3. State Courts System Purchasing Directive pertaining to bid protest procedures and proceeding can be accessed within the Directives, Section 6.10 Protest Procedures, and are incorporated in this Request for Qualifications.

**Exhibit "A"**

**Conflict of Interest Disclosure Form**

**I HEREBY CERTIFY** that:

1. I \_\_\_\_\_ (*name*) am the \_\_\_\_\_  
(*title*) and the duly authorized representative of (*Company name*) \_\_\_\_\_  
whose address is \_\_\_\_\_  
\_\_\_\_\_; and
2. I possess the legal authority to make this affidavit on behalf of myself and the  
company for which I am acting; and,
3. Except as listed, no employee or officer of the Court owns an interest of 5% or more  
in the company, and no employee, officer, or agent of the company has any conflict  
of interest, real or apparent, due to ownership, other clients, contracts, or interests  
associated with this project; and,
4. This proposal is made without prior understanding, agreement, or connection with  
any other company, or person submitting a proposal for the same services, and is in  
all respects fair and without collusion or fraud.

**EXCEPTIONS:** (Attach list of exceptions) (If none, so state)

\_\_\_\_\_  
Signature Printed Name

\_\_\_\_\_  
Company Name Date

Sworn to and described before me this \_\_\_\_\_ day of \_\_\_\_\_,  
20\_\_\_\_\_

Personally known \_\_\_\_\_ OR produced identification

\_\_\_\_\_  
(Type of Identification)

My Commission expires \_\_\_\_\_



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(Printed, typed or stamped commissioned name of Notary Public)