

The State Bar of California
Forms Design
Request for Proposal: Questions and Responses

- 1. I am interested in bidding on the Forms Design RFP. We are a small company and a California Certified Small Business. We do not meet the insurance requirements however. Is there any alternative to the insurance requirement?**

You may still provide a formal written proposal, per the posted submission requirements of this RFP. Please clearly state any exceptions you wish to take to the legal terms and conditions, including exceptions to the requested insurance requirements.

- 2. What is the deadline to complete all forms?**

There is no deadline for completion of all the forms, but because the six forms listed on page 2 of the RFP are tied to new rules that become effective January 1, 2007, we would like to have those six forms ASAP. The schedule for revising the many remaining forms (estimated at well over 100) depends on whether the business processes reflected in the forms need to be revised or not. In many instances, it will be possible to recast a form in the new style right away because we aren't changing processes. We estimate there are at least 30-40 forms like this. In some other cases, we want to streamline or simplify processes and then create new forms to match the new processes. We will work with a vendor to define the project scope.

- 3. What is the approximate # of forms that need redesigned and approximate # that needs to be created?**

All the forms that are available to the public need to be redesigned for the reasons stated in the RFP. Most of them are online at http://calbar.ca.gov/state/calbar/calbar_extend.jsp?cid=10113&id=25990. Some of them are not there, such as those for the Multijurisdictional Practice Program (http://calbar.ca.gov/state/calbar/calbar_generic.jsp?cid=12441&id=16143) and those for Legal Specialization (http://calbar.ca.gov/state/calbar/calbar_generic.jsp?cid=11584&id=12403)

- 4. Do you have new forms that you want designed or just the redesign of existing forms?**

See preceding answer.

5. **Do you have a preference for the program(s) you would like the forms created in (i.e., fillable Word documents, PDFs, HTML)?**

At this stage I would say fillable Word and fillable PDFs.

6. **What is the ultimate goal for public forms on the State Bar of California web site? For instance:**

- **Form is available online but not fillable**
- **Form is available online and fillable**
- **Form is available online but not saveable**
- **Form is available online and can be saved**
- **Form is protected and can not be changed**
- **Form is unprotected and can be edited**
- **Form can be filled and submitted online**
- **Data from form can be captured to internal software**

Ultimately we want to have online forms that can be filled out and submitted online, the data being pulled into an internal system and the user being provided an electronic copy (as indicated in the underlined items above). Achieving these goals requires technology decisions that have yet to be made.