

REQUEST FOR PROPOSALS

***SUPERIOR COURT OF CALIFORNIA
COUNTY OF VENTURA***

REGARDING:

*Case Management System
V1617-08*

PROPOSALS DUE:

Thursday, March 7, 2017 NO LATER THAN ***4:00*** P.M. PACIFIC TIME

1.0 BACKGROUND INFORMATION

The Superior Court of California, County of Ventura (the “Court”) invites proposals for a new judicial case management system (CMS). The Court holds approximately 425 user licenses to its legacy CMS and manages 21 case types. The current CMS is hosted off-site through the Judicial Council of California. The Court envisions moving to a web-based, locally installed CMS that will provide flexibility for public portals and systems to improve efficiency. The Court will also consider off site hosting of the CMS by the vendor if it meets the needs of the Court.

The Court will post all correspondence related to this RFP on its public website at <http://www.ventura.courts.ca.gov/vendors.html>

2.0 DESCRIPTION OF GOODS AND/OR SERVICES

Please refer to Attachment 8 – Summary Scope of Work and to attachments 9 thru 14, and 16 thru 18 for a detailed description.

The Court is seeking an 18-month installation schedule upon execution of the agreement. Please note that the Court will not accept any proposal and related scope of work which requires payment in advance for professional services or payment for software licenses prior to the “go-live.”

3.0 TIMELINE FOR THIS RFP

The Court has developed the following list of key events related to this RFP. All dates are subject to change at the discretion of the Court.

EVENT	DATE (all PST)
RFP issued	<i>Monday, February 6, 2017</i>
Deadline for questions send to both: jim.jenson@ventura.courts.ca.gov & jill.barrios@ventura.courts.ca.gov	<i>Tuesday, February 21, 2017 4:00 p.m.</i>
Deadline for Solicitation Specifications Protest	<i>Tuesday, February 21, 2017 4:00 p.m.</i>
Latest date and time proposal may be submitted	<i>Tuesday, March 7, 2017 4:00 p.m.</i>
Invitations for demonstrations (<i>estimated/if needed</i>)	<i>March 8, 2017</i>
Demonstrations (<i>estimate only/if needed</i>)	<i>March 13 – March 17, 2017</i>

EVENT	DATE (all PST)
Public opening of cost portion of proposals at 1000 Hill St., Suite 300, 3 rd floor Conference Room Ventura, CA 93003	<i>March 20, 2017 3:45 p.m.</i>
Notice of Intent to Award (<i>estimate only</i>)	<i>April 3, 2017</i>
Contract start date (<i>estimate only</i>)	<i>July 1, 2017</i>
Contract end date (<i>estimate only</i>)	<i>June 30, 2020 with options to extend for up to 10 additional years</i>

4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (IT Goods and Services)	These rules govern this solicitation.
Attachment 2: Court Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must sign a Court Standard Form agreement containing these terms and conditions (the “Terms and Conditions”).
Attachment 3: Proposer’s Acceptance of Terms and Conditions	On this form, the Proposer must indicate acceptance of the Terms and Conditions or identify exceptions to the Terms and Conditions.
Attachment 4: General Certifications Form	The Proposer must complete the General Certifications Form and submit the completed form with its proposal.
Attachment 5: Small Business Declaration	The Proposer must complete this form only if it wishes to claim the small business preference associated with this solicitation.
Attachment 6: Payee Data Record Form	This form contains information the Court requires in order to process payments and must be submitted with the proposal.

ATTACHMENT	DESCRIPTION
Attachment 7: Iran Contracting Act Certification	The Proposer must complete the Iran Contracting Act Certification and submit the completed certification with its proposal.
Attachment 8: Summary Scope of Work	Summary description of goods and services requested. Specific requirements are included in attachments 9 thru 15.
CMS Requirements & Court Informational Attachments	
Attachment 9	CMS Business, Functional and Integration Requirements
Attachment 10	CMS Testing Requirements
Attachment 11	CMS Configuration Requirements
Attachment 12	CMS Training Requirements
Attachment 13	CMS Network/Desktop Requirements
Attachment 14	CMS Infrastructure/Application/Architecture/Security Requirements
Attachment 15	Ventura Court Information
CMS Functional Requirements Attachments	
Attachment 16	Manual of Accounting
Attachment 17	Bail Calculation and Recalculation Process
Attachment 18	JBSIS Implementation Manual
Proposal Submission	
Attachment 19	Ventura CMS RFP Costing Matrix
Attachment 20	RFP Response Template

5.0 PAYMENT INFORMATION

- Milestone payments for services.
- Retention of 10% of the total cost of professional services payable upon final acceptance and go-live
- Payment for vendor and third-party software upon productive use (“go-live”)
- Reimbursable expenses will be allowed per Attachment 2 – Exhibit 7 and 8.

6.0 PRE-PROPOSAL CONFERENCE

The Court will not hold a pre-proposal conference.

7.0 SUBMISSIONS OF PROPOSALS

7.1 Proposals should provide straightforward, concise information that satisfies the requirements of the “Proposal Contents” section below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the RFP’s instructions and requirements, and completeness and clarity of content.

- 7.2 The Proposer must submit its proposal in two parts, the non-cost portion and the cost portion.
- a. The Proposer must submit **one (1) original and four (4) copies of the non-cost portion** of the proposal. The original must be signed by an authorized representative of the Proposer. The original non-cost portion of the proposal (and the copies thereof) must be submitted to the Court in a single sealed envelope, separate from the cost portion. The Proposer must write the RFP title and number on the outside of the sealed envelope.
 - b. The Proposer must submit **one (1) original and four (4) copies of the cost portion** of the proposal. The original must be signed by an authorized representative of the Proposer. The original cost portion of the proposal (and the copies thereof) must be submitted to the Court in a single sealed envelope, separate from the non-cost portion. The Proposer must write the RFP title and number on the outside of the sealed envelope.
 - c. The Proposer must submit an electronic version of the entire proposal on a USB flash drive. The files must be in MSWord, or Excel. In addition to these formats, Proposer may also provide copies in PDF.
- 7.3 Proposals must be delivered by the date and time listed on the coversheet of this RFP to:
- Superior Court of California, County of Ventura
Attention: Jill Barrios, Sr. Analyst
Finance & Planning
800 S. Victoria Ave.
Ventura, CA 93003
- 7.4 Late proposals will not be accepted.
- 7.5 Only written proposals will be accepted. Proposals must be sent by registered or certified mail, courier service (e.g. FedEx), or delivered by hand. Proposals may not be transmitted by fax or email.

8.0 PROPOSAL CONTENTS

8.1 Non-Cost Portion. The non-cost portion must be submitted in accordance with Attachment 20 Response Template. A proposal lacking any of the information identified in Attachment 20 may be deemed non-responsive.

Good standing: If Contractor is a California corporation, limited liability company (“LLC”), limited partnership (“LP”), or limited liability partnership (“LLP”), proof that

Contractor is in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor conducts or will conduct (if awarded the contract) intrastate business in California, proof that Contractor is qualified to do business and in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor does not (and will not if awarded the contract) conduct intrastate business in California, proof that Contractor is in good standing in its home jurisdiction.

8.2 Cost Portion. The Cost information must be submitted according to Attachment 19 and according to section 3.0 of Attachment 20 Response Template. The original cost portion of the proposal (and the copies thereof) must be submitted to the Court in a single sealed envelope, separate from the non-cost portion. The following information must be included in the cost portion of the proposal.

NOTE: It is unlawful for any person engaged in business within this state to sell or use any article or product as a “loss leader” as defined in Section 17030 of the Business and Professions Code.

9.0 OFFER PERIOD

A Proposer's proposal is an irrevocable offer for one hundred eighty (180) days following the proposal due date. In the event a final contract has not been awarded within this period, the Court reserves the right to negotiate extensions to this period.

10.0 EVALUATION OF PROPOSALS

The cost portion of proposals will be publicly opened at the date and time noted in Section 3.0.

The Court will invite proposers to the vendor demonstrations based upon the completeness of the RFP response and based upon the vendors ability to meet the stated requirements.

The Court will evaluate the proposals on a 100 point scale using the criteria set forth in the table below. Award, if made, will be to the highest-scored proposal.

If a contract will be awarded, the Court will post an intent to award notice at www.ventura.courts.ca.gov

CRITERION	MAXIMUM NUMBER OF POINTS
<i>Interview, Quality of work plan and ability to meet timing requirements to complete project; Acceptance of the Terms and Conditions and compliance with RFP requirements</i>	35
<i>Experience on similar assignments and credentials of staff to be assigned to project</i>	15

CRITERION	MAXIMUM NUMBER OF POINTS
<i>Cost</i>	<i>50</i>

11.0 INTERVIEWS

The Court may conduct interviews as needed with responsive and qualifying Proposers to clarify aspects set forth in their proposals or to assist in finalizing the ranking of top-ranked proposals. The interview process may require an onsite demonstration. The interview may also require a demonstration of equivalence if a brand name is included in the specifications. The interviews will be conducted in person. Interviews will be held at the Court's offices. The Court will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The Court will notify eligible Proposers regarding interview arrangements.

12.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

PROPOSALS ARE SUBJECT TO DISCLOSURE PURSUANT TO APPLICABLE PROVISIONS OF THE CALIFORNIA PUBLIC CONTRACT CODE AND RULE 10.500 OF THE CALIFORNIA RULES OF COURT. The Court will not disclose (i) social security numbers, or (ii) balance sheets or income statements submitted by a Proposer that is not a publicly-traded corporation. All other information in proposals will be disclosed in response to applicable public records requests. Such disclosure will be made regardless of whether the proposal (or portions thereof) is marked "confidential," "proprietary," or otherwise, and regardless of any statement in the proposal (a) purporting to limit the Court's right to disclose information in the proposal, or (b) requiring the Court to inform or obtain the consent of the Proposer prior to the disclosure of the proposal (or portions thereof). Any proposal that is password protected, or contains portions that are password protected, may be rejected. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

13.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE

The Court participates in disabled veteran's business enterprise participation goals. Court guidelines are published on its website at: www.ventura.courts.ca.gov

14.0 SMALL BUSINESS PREFERENCE

Small business participation is not mandatory. Failure to qualify for the small business preference will not render a proposal non-responsive.

Eligibility for and application of the small business preference is governed by the Court's Small Business Preference Procedures for the Procurement of Information Technology Goods and Services. The Proposer will receive a small business preference if, in the Court's sole determination, the Proposer has met all applicable requirements. If the

Proposer receives the small business preference, the score assigned to its proposal will be increased by an amount equal to 5% of the points assigned to the highest scored proposal. If a DVBE incentive is also offered in connection with this solicitation, additional rules regarding the interaction between the small business preference and the DVBE incentive apply.

To receive the small business preference, the Proposer must be either (i) a Department of General Services (“DGS”) certified small business or microbusiness performing a commercially useful function, or (ii) a DGS-certified small business nonprofit veteran service agency.

If the Proposer wishes to seek the small business preference, the Proposer must complete and submit with its proposal the Small Business Declaration (Attachment 5). The Proposer must submit with the Small Business Declaration all materials required in the Small Business Declaration.

Failure to complete and submit the Small Business Declaration as required will result in the Proposer not receiving the small business preference. In addition, the Court may request additional written clarifying information. Failure to provide this information as requested will result in the Proposer not receiving the small business preference.

If the Proposer receives the small business preference, (i) the Proposer will be required to complete a post-contract report; and (ii) failure to meet the small business commitment set forth in its proposal will constitute a breach of contract.

FRAUDULENT MISREPRETATION IN CONNECTION WITH THE SMALL BUSINESS PREFERENCE IS UNLAWFUL AND IS PUNISHABLE BY CIVIL PENALTIES. SEE GOVERNMENT CODE SECTION 14842.5.

15.0 PROTESTS

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contracting Manual (see www.courts.ca.gov/documents/jbcl-manual.pdf). Failure of a Proposer to comply with the protest procedures set forth in that chapter will render a protest inadequate and non-responsive, and will result in rejection of the protest. All protests will be handled in accordance with the Court’s protest policy published at www.ventura.courts.ca.gov