

QUESTIONS RELATING TO RFP # 1310-002, ONLINE BIDDING SYSTEM & ANCILLARY SERVICES

Orange County Superior Court has received the following questions regarding RFP #1310-002 for the Online Bidding System and Ancillary Services. Answers will be posted at: <http://www.courts.ca.gov/25033.htm>.

1. Section 1.2.2: The primary service being requested is an online bidding system.....Therefore, a successful Bidder will be able to interface with the DGS website. Can you please clarify what you mean by interface with the DGS website? More details about the level of interface is necessary.

The online bidding system currently validates if proposers are registered and classified by the State of California, thru the Department of General Services, as a Disabled Veteran's Business Enterprise (DVBE), Micro Business (MB); Small Business (SB); Non-Profit Veteran Service Agency (NVSA). The Court expects that the successful bidder will be able to confirm if bidders are designated by the State of California as any of the above listed classifications.
2. Upon review of the Master Services Agreement (MSA) and the Sample Participation Agreement (PSA) we have found the terms of the both are very duplicative. Is there are reasoning behind this? Is it possible to eliminate some of the duplication?

If your company would like to take any deviations or exceptions to the MSA or the Participation Agreement, please indicate so on Attachments G and H.
3. In the MSA section 12.1.2 - we find the language 'or otherwise loses legal control of its business' - we find this clause too broad and would like specific clarification.

If your company would like to take any deviations or exceptions to the MSA or the Participation Agreement, please indicate so on Attachments G and H.
4. In the MSA section 12.3.1 - we find the language 'Withhold all or any portion of a payment otherwise due to Contractor' - we find this remedy is too broad and bears no relation to a breach. The "set off" provision mentioned below is more appropriate. We would like specific clarification on this clause.

If your company would like to take any deviations or exceptions to the MSA or the Participation Agreement, please indicate so on Attachments G and H.
5. We would like clarification on an item touched on during the teleconference. It was stated that the Courts are looking for 4 parts - Online Bidding, Certificate Verification Process, Insurance Verification, and Contract Management - respondents were welcome to submit responses to any or all parts requested. This would indicate that multiple awards can be issued. If our company submits responses to all 4 requested parts and the Courts do not select our company for all of the parts, additional cost may occur to interface with the other applications the Courts awarded. We do have a way to calculate a cost for this scenario. How does the Court propose we handle this situation?

The Court recommends that you submit multiple proposals indicating the different scenarios.
6. Will [vendor name redacted] be training your end-users, or do you prefer train-the-trainer?

The Court prefers a train the trainer method. Bidders should indicate in their proposal the number of training hours recommended.

7. How many total legacy (historic) bid and contract records will be imported into the Bidding & Contract Management System?

As clarification, the Court currently uses two separate systems. 1) Online bidding is provided by BidSync. 2) Contract management is currently provided via SharePoint.

Online Bidding System: The Court does not anticipate importing any records from the current online bidding provider.

Contract Management System: There are approximately 600 current active contracts with associated amendments and supporting documentation that would migrate into the new system as well as metadata associated with the contract tracking (e.g. expiration date, vendor contacts, contract no., etc.) that would also need to be migrated to the new system. Legacy contract documents would remain in the existing system. It would be the Court's preference that metadata related to archived contracts (expired and/or terminated) be transferred into the new system.

8. What format are the legacy (historic) contract records currently in (MS Excel, MS Access, legacy system, etc.)?

Contract records are currently stored in SharePoint, a Microsoft Product. Most documents are in Word, PDF, and Excel. Metadata related to contract documents can be exported in Excel or Access (from SharePoint).

9. How many columns/fields are currently tracked for the legacy (historic) bid records and contract records?

The current contract management system tracks 99 data points with some overlap and duplication (currently there are four connected lists/libraries in SharePoint with some shared data points to create the current contract management system).

The Online Bidding system provides data fields: Bid No., Bid Title, Bid Description, Bid Type (Quick Quote, Reverse Auction, RFQ, RFP, RFI, RFB), Bid Comments, Bid Due Date and Time, Time remaining (from date of posting to closing), Bid Contact, Budgeted Amount, Bid Response Model (Electronic, Paper, Paper with Electronic Tabulation), Bid Release Date, Sealed vs. Non-Sealed, Bid Duration and Time, Bid Question and Answer Duration and Due Date, Pre-Bid Conference Date and Time, Classifications (NIGP codes), Required Vendor Qualifications (CA-DVBE, CA-MB, CA-NVSA, CA-SB, CA-SBE, SB); Vendor solicitation filter: This bid will be Public, Private, Regional, within X miles of zip code.

10. How many total legacy (historic) electronic contract files will be imported into the Bidding & Contract Management System?

Online Bidding System: The Court does not anticipate importing any electronic files into the online bidding system.

Contract Management System: Approximately 1500 Contract Folder files each with at least one contract file, and some with several amendment or ancillary/associated files (approximately 3067 total contract files).

See response to Question No. 4 above.

11. Where are the legacy (historic) electronic bid files and contract files currently stored (shared folders, Sharepoint, document management system, etc.)

Electronic bid files and contract files are currently stored in both shared folders (local owned server storage) and SharePoint.

12. What third-party systems do you anticipate will be integrated with the Bidding & Contract Management System? Please provide system details (system name, database used, home-grown or commercial) if applicable.

Online Bidding System

The Court anticipates integrating the following with the Online Bidding System

- 1) Microsoft Office, including but not limited to: Word, Excel and Outlook
- 2) Integration with the Court's intranet and internet. The Court currently posts all open bids and bid results on its internet page (<http://www.occourts.org/general-info/court-contract-bids/current-bids.html>), and would like to maintain the same functionalities.

Contract Management System

The Court anticipates integrating the following with the Contract Management System:

- 1) SharePoint
- 2) Digital signature program / software package (Court is anticipating a purchase of a commercial product).
- 3) Microsoft Office, including but not limited to: Word, Excel and Outlook.
- 4) Although not required for this solicitation, if vendors have the capability of integrating the contract management system into SAP, vendors should identify that capability. Current SAP system release is SAP NetWeaver, SAP GUI for Windows, Release 730 Final Release, File Version 7300.1.1.1077.

13. What data will your organization be passing in the data integration between the Bidding & Contract Management System and other third-party systems?

Between the Bidding & Contract system – applicable metadata should be transferred.

The Contract management system should be able to share metadata and documents with other systems, e.g., Outlook. There are no other data integration necessary besides contract/bid documents and metadata.

The Court identifies contracts in two ways. The first are "Active Contracts" which are current contracts. The second are "Archive Contracts" which include all expired, terminated, cancelled contracts. The Court prefers that "Active Contracts" and related documents be transferred into the new Contract Management System. For "Archive Contracts", the Court prefers that only the metadata be transferred. If your Contract Management System does not have the capability to automatically or batch transfer documents/files, e.g., Word, Excel and .pdf documents, the Court will manually transfer all documents and files for all active contracts.

For the online bidding system, no transfer of documents or data would be required.

14. Can you please provide more details for the requirement "3.3 Validate certificates monthly"?

This question refers to the Insurance Verification Services. Among other requirements, the Insurance Verification System must verify that insurance certificates are not expired and the insurance providers maintain an acceptable AM Best rating and meet the requirements of the contract.

15. For requirement 3.4, will Court users be entering the A.M. Best insurance rating requirements in the online bidding system or will the system be verifying data another system?

This question refers to the Insurance Verification Services: The Insurance Verification System will be responsible for verifying A.M. Best insurance ratings. The Court prefers that Insurance Verification Services interface with the A.M. Best rating service and provide an electronic confirmation to the Court or documentation in the Insurance Verification solution that the requirements have been met.

16. For requirement 3.5, will Court users be entering the certificate and endorsement requirements in the online bidding system or will the system be verifying data another system?

This question refers to the Insurance Verification Services. The Insurance Verification System will verify that insurance certificates meet all Court requirements.

The Court will provide all certificate and endorsement requirements. The Court's preference is that the service will verify the requirements from executed contracts and/or bid solicitations.

17. Can you please provide more details for the requirement "3.9. Respond to incoming calls, inquiries and/or follow up from insured and agents."

This question refers to the Insurance Verification Services. The Insurance Verification System will be responsible for collecting insurance certificates. Questions from insureds or agents will be directed to the Contractor providing Insurance Verification.

18. Can the Court clarify Question 3.3: Validate Certificates Monthly (Attachment A-2: Insurance Verification)? What type of validation is the Court looking for?

Among other requirements, the Insurance Verification System must verify that insurance certificates are not expired, provide sufficient coverage in accordance with contract requirements, and the insurance providers maintain an acceptable AM BEST rating.

19. Can the Court clarify Question 5.3.3: Transcripts of Conferences.... (Attachment A-1: Online Bidding System). Is the court looking for full transcription services? Or just the ability to post transcripts performed by the Court after the pre-evaluation meetings?

The Court would like to see the different options available. If your system can provide transcripts, please describe what type of services available.

20. Under Contract Management: Section 3.16 Ability to accommodate internal customer requests for project initiation. Please elaborate on types of requests.

The Court would like to have a system that allows internal customers to request a project. The system would automatically notify Contacts and Procurement staff of a pending assignment. The manner of how this is accomplished depends on your system.

21. Under Contract Management: 3.28 Screen, score and analyze outcomes of proposals from RFP/RFQs. Is this RFP evaluation or evaluation of work performed during the contract?

This is not a requirement for the Contract Management System.

However, if Bidders are proposing an integrated online bidding system and contract management system, this is a requested item. If the online bidding system has a feature that allows Court internal evaluation team members to review and score the bid submittals and indicate scoring within the bidding system, the preferred system would indicate minimum requirements, qualifications and certifications have been provided and met as identified in the bid posting. This information along with cost should be provided in a summary format per bid. Additionally it should provide reporting capabilities on multiple data points, (e.g. the number of DVBE vendors and spend totals, Award totals by NIGP code, etc.) Bidder's proposals should identify to what extent they can provide that capability.

22. How many Court Users do you anticipate that will be submitting or creating bids on the online bidding system and how many Court Users will only have access to view vendor or bid related information?

The Court anticipates twenty (20) users that will have full access to edit, upload, delete, approve bids, etc. Ideally the Court would prefer an unlimited number of users to view vendor or bid related information, however, this will depend on pricing. Currently, the Court employs 1500 staff members with approximately 500 of those being active viewers during the course of a business year.

23. In Attachment B – Cost Proposal, please clarify under section 3 – Cost Proposal - Contractor Certification, you have it as titled: **INSURANCE VERIFICATION – OPTION 1 – Flat Rate and INSURANCE VERIFICATION – OPTION 2 – Cost to verify licenses for one (1) contractor (Per contractor basis)**. Not sure how Insurance verification – Option 1 relates to Contractor certification or as we understand it Contractor Pre-qualification. Is that titled incorrectly as insurance certification and verification is part of B-2 of the Cost Proposal.

That was titled incorrectly and is corrected in Addenda 2.