RFP Number: CFCC-18-49-RB

# REQUEST FOR PROPOSALS

### CFCC-18-49-RB

## JUDICIAL COUNCIL OF CALIFORNIA CENTER FOR FAMILIES, CHILDREN & THE COURTS

#### **REGARDING:**

Case Management Solution for Juvenile Dependency Attorneys in the State of California

#### **PROPOSALS DUE:**

March 29, 2019 NO LATER THAN 2:00 P.M. PACIFIC TIME

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#### 1.0 BACKGROUND INFORMATION

1.1 The Judicial Council of California (referred to herein as JBE or JCC), chaired by the Chief Justice of California, is the chief policy making agency of the California judicial system. The Center for Families, Children & the Courts ("CFCC") is dedicated to improving the quality of justice and services to meet the diverse needs of children, youth, families, and self-represented litigants in the California courts.

1.2 CFCC has implemented the Dependency Representation Administration Funding and Training ("DRAFT") program to further the JCC's goal of improving the quality of court-appointed counsel in juvenile dependency proceedings and maximizing the resources available for those services.

#### 2.0 DESCRIPTION OF GOODS AND/OR SERVICES

#### 2.1 <u>Purpose</u>

The JBE seeks written proposals for a Case Management Solution (CMS) and accompanying professional services of a person or entity with expertise in supporting a web-based dependency case-type CMS for use by Third Party dependency attorneys throughout the State. The proposed CMS must also import and maintain legacy data, conduct training of personnel who may utilize the system, application hosting, and provide ongoing maintenance and support. The purpose of this Project is to provide dependency attorneys access to a web-based solution that will *not* be hosted locally at a JCC facility. This Request for Proposal (RFP) is the means for prospective service providers to submit their qualifications and request selection as a service provider.

Additional information and documents pertaining to this solicitation, including electronic copies of the solicitation documents, can be found on the California Courts Website located at <a href="https://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a> ("Court's Website")

#### 2.2 Goal

The primary goal of the RFP is ensure that dependency attorneys are provided access to a CMS that allows them to enter case and workload information related to mandatory reporting requirements, which the JCC uses in determining attorney compensation and monitoring attorney performance. In addition, the CMS should allow dependency attorneys to organize and manage services provided to clients related specifically to juvenile dependency proceedings for example, sending text (sms) reminders to clients. The selected CMS and associated services should be modern, efficient, reliable, economical and proven. It is also the goal of this RFP to engage an experienced Contractor, capable of executing an efficient project within a two-month timeframe and also within budget.

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#### 2.3 Term

The JCC expects the selected person or entity submitting a proposal ("Proposer") to perform activities and responsibilities associated with the solicitation for ten (10) years. The Initial Term will be for five (5) years, with the JCC's option to extend for five (5) additional one-year terms.

#### 2.4 Scope

The scope of the RFP is to obtain case management software licensing and a hosting solution for the CMS application.

#### **Summary:**

Essential Technology or Service	
<ul> <li>Compliant with Business &amp; Functional /Non Functional Requirements, (Appendix H)</li> <li>Current with state laws, federal regulations, rules of court, and administrative requirements</li> <li>Compliant with United States Section 508 of the Rehabilitation Act (29 U.S.C. 794d), as amended by the Workforce Investment Act of 1998.</li> <li>Identification information will not be distributed, sold or mined without the express written consent of the customer</li> <li>Responsive to changes in state laws, federal regulations, rules of court, and administrative requirements</li> <li>Scalable solution to accommodate JCC and third-party users and data volume</li> <li>Database agnostic</li> <li>Web-based and ADA Compliant portal</li> <li>Alerts, monitoring &amp; Notification should have classification and threshold rules and include:         <ul> <li>Monitoring 24/7 for system availability to ensure SLA relay notifications to a distribution list based on threshold rules</li> <li>Provide advance notification of system downtime(s)</li> </ul> </li> <li>Configurable workflow to actively process cases using automated and manual work queues (also see Appendix J)</li> <li>Security         <ul> <li>All users must be uniquely identifiable</li> <li>All users must be authenticated</li> <li>All users must be authenticated</li> <li>All users supports password management policies</li> <li>Set password complexity level</li> </ul> </li> </ul>	

Component	Essential Technology or Service	
	<ul> <li>Allow administrators to disable accounts</li> <li>Allow self-service password reset</li> <li>Data security</li> <li>Data at rest must be securely protected (i.e. encrypted)</li> <li>Data in transit must securely transmitted (i.e., encrypted)</li> <li>All Personally Identifiable Information (PII) must be securely protected</li> </ul>	
	<ul> <li>System shall not:</li> <li>a) perform any of its obligations from locations or using employees, contractors and/or agents situated outside the United States, or</li> <li>b) directly or indirectly (including through the use of subcontractors) store any Data outside the United States, nor will the Contractor allow any Data to be accessed by Contractor's employees, contractors and/or agents from locations outside the United States, without prior written consent of the JCC.</li> <li>c) Require any client-side installs</li> <li>d) Require any plug-ins or Active X control</li> </ul>	
	<ul> <li>Proposed CMS application, all sub-components, and associated hardware and software are in compliance with remote hosting requirements and the Business and Functional/ Non Functional Requirements for the JCC Appendix H.</li> <li>Available Service Support levels, 24/7</li> <li>Systems management set forth in Appendix H)         <ul> <li>The solution shall have a Recovery Point Objective (RPO) of no more than 1 hour</li> <li>The solution shall have a Recovery Time to Operations (RTO) of no more than 24 hour</li> </ul> </li> <li>Third Party Software requirements</li> <li>System will have online systems documentation for administrators and users</li> </ul>	

Component	Essential Technology or Service	
Deployment Services	<ul> <li>Deployment approach that includes:         <ul> <li>Deployment Plan</li> <li>Training Plan</li> <li>Integration Plan</li> <li>Data Conversion Plan</li> <li>Cutover Plan</li> </ul> </li> <li>Proposer resources for implementation, testing, training and cutove activities:         <ul> <li>Environment Specifications</li> <li>Implementation Services</li> <li>Baseline Configuration</li> <li>Administration</li> <li>Documentation</li> <li>Testing of Business Functionality and Validation using valid busines cases with known and expected results (also see Appendix H)</li> <li>Integration testing</li> <li>End-User Training/Knowledge Transfer</li> <li>User Acceptance planning, coordination, testing and JCC acceptance</li> <li>Go-Live Support</li> <li>Post-implementation support and project closeout</li> </ul> </li> </ul>	
Maintenance and Support	<ul> <li>Maintenance and support that complies with JCC Standard Terms an Conditions (Attachment 2) which shall include but not be limited to:         <ul> <li>Application Software Licensing</li> <li>24/7 Application Support and Technical Support for hosted solution</li> <li>Assignment of a delivery manager, as a single point of contact</li> <li>Disaster Recovery Testing. Solution will conduct at minimum a annual disaster recovery exercise to ensure system survivability</li> <li>On-line training and support materials including courses (if needed available to user and administrators</li> <li>Provision of periodic maintenance, legislative updates, and securit upgrades per service-level standards and support agreements</li> <li>Global configuration changes necessary to support business change (also see Appendix H)</li> <li>Emergency support for break-fix situations via alerts &amp; notifications</li> </ul> </li> </ul>	
Warranty	<ul> <li>Service Warranty that complies with the JCC Standard Terms an Conditions (Attachment 2)</li> <li>Licensed Software Warranty that complies with the JCC Standard Term and Conditions (Attachment 2)</li> </ul>	

#### 2.4.1 The implementation of CMS application includes:

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• Providing CMS application software that meets the Business and Functional/ Non Functional Requirements for the JCC (Appendix H)

- A minimum of 99.9% uptime
- Configuring and testing the CMS application, and its legacy data according to the business rules of the JCC
- Maintaining the CMS application for changes in regulatory requirements, application enhancements, common configuration changes, and fixing program defects
- Cutover and post go-live services
- Working in cooperation with the JCC and any other necessary contractors in order to make the CMS available in a manner that ensures a high quality of service to users on multiple platforms, including mobile devices

#### 2.4.2 <u>Hosting Solution includes:</u>

- Providing a secure hosting infrastructure to run the CMS using modern proven technology that is in compliance with the remote hosting requirements and the Business and Functional/ Non Functional Requirements for the JCC (Appendix H)
- Working in cooperation with the JCC and any other necessary contractors, in making the CMS available in a manner that assures a high quality of service to users
- Providing CMS configurations

#### 2.4.3 <u>Deployment Services</u>

It is the aim of the JCC to appoint an experienced Contractor capable of executing an efficient project within the agreed-upon schedule and budget. Prepare a deployment approach and implementation plan that will meet the high-level tasks for this Project. The deployment approach should include resource loading necessary for implementation activities.

#### 2.4.3.1 Deployment Approach:

• Implementation Plan

Provide a detailed implementation plan that includes the following necessary JCC staff and required skill sets:

- o Implementation timeline not to exceed 2 months
- Software loads
- o Base system ready date
- o Resources and responsibilities
- o Base system setup
- o Business process change strategy

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- Testing strategy
- o Training strategy
- o Planned communication to stakeholders
- o Go-Live support approach and planning
- o Risk analysis and contingency planning
- o Post-implementation approach and support planning

#### 2.4.3.2 Contractor Resources and Implementation Activities:

#### • Implementation Services

Contractor and the JCC will implement the user acceptance test and production environments solution. Contractor and the JCC will execute the implementation plan defined—that includes an emphasis on implementation, cut-over, risk and contingency planning, post-implementation support planning, and knowledge transfer and transition strategy.

#### • Administration

Contractor will train the JCC staff in the, administration, system updating, tuning, and troubleshooting procedures.

#### • Reports and Forms

The Contractor will work with the JCC to identify reports and forms required as well as codified values that should be included in the new CMS configuration.

#### • Documentation

The Contractor is responsible for creating the standard online systems documentation for administrators and users. The Contractor working with the JCC will create user and system administration manuals that are required by the JCC.

#### • Testing of Business Functionality and Validation

The Contractor and the JCC will train several groups of testers in the use of the system using the approved configuration and documentation. The testers with Contractor business leads will then conduct system testing and validation of the configuration. They will draw from their experience and also use the test cases created by the Contractor, working with subject matter experts. Configuration and application fixes will be regression tested and re-examined by testers with the assistance of

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Contractor business leads until testing results meet the agreed upon exit criteria.

#### • End User Training/Knowledge Transfer

The Contractor will train the JCC trainers through acceptance. The JCC trainers utilizing Contractor-provided core documentation will create, with Contractor's assistance, the training program, including documentation as desired. Training programs should include but not be limited to:

- o Baseline End-User Training
- o System Administrator Training

#### • Go-Live Support

The Contractor will provide resources for go-live activities ensuring a seamless business transition utilizing the new CMS.

#### Post Implementation Support and Project Closeout

The Contractor will provide business and technical support of the CMS to ensure a successful implementation by the user community. The Contractor will provide application support, track and resolve issues that are uncovered, perform any necessary system tuning to maintain acceptable system performance per Service Level Requirements (Attachment 2) finalize technical documentation, and finalize knowledge transfer to the JCC. The Proposer will perform project closeout tasks and document lessons learned.

#### 2.4.4 <u>Guidelines for Deployment Services Deliverables</u>

The goal of this Project is to have a new CMS installed and configured within two (2) months after a contract is signed. Based upon these goals and the capacity of your company, prepare a deployment schedule, project plan and deployment budget.

- Describe your implementation planning (including project management) process.
- Describe your recommendation for roles your company personnel will assume and the roles that JCC staff should assume in the implementation process.
- Describe your process for coordinating user acceptance.
- Describe your process for change management.
- Describe your process for critical defect scenarios.

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• Describe your process for coordinating software upgrades and version management.

- Describe the process employed to track and report progress in system deployment.
- Describe the process and standards employed in determining when phases of deployment are satisfactorily completed.

Describe the process involved in implementing any required state and local configurations, e.g., implementation of state statutes and rules, creation of standard state documents, state calendar, etc. Include any JCC personnel required to accomplish the task.

#### 3.0 TIMELINE FOR THIS RFP

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

EVENT	DATE
RFP issued	January 22, 2018
Deadline to register for Pre-proposal conference (Q & A session) via <b>Solicitations@jud.ca.gov</b>	February 1, 2019
Pre-proposal Conference	February 8, 2019 2:00 P.M. – 3:00 P.M.
Deadline for written questions to Solicitations@jud.ca.gov	February 22, 2:00 PM, Pacific Time
Questions and answers posted (estimate only)	March 8, 2019
Proposer Solicitation Specifications Protest Deadline	March 15, 2019
Latest date and time proposal may be submitted	March 29, 2019, 2:00 PM, Pacific Time
Pre-pricing evaluation of non-cost proposals	April 1 to 26, 2019
Non-cost proposal scores per Proposer posted at <a href="https://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a> (estimate only)	April 30, 2019
Public opening of cost portion of proposals	May 1, 2019
Notice of Intent to Award (estimate only)	May 13, 2019

EVENT	DATE
Negotiations and execution of contract ( <i>estimate only</i> )	May 14 - 21, 2019
Contract start date (estimate only)	June 1st, 2019
Contract end date (estimate only)	May 31st, 2024

#### 4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Appendix H:	On this form, the Proposer must respond and submit the
Business and	completed form with its proposal.
Functional/ Non	
Functional	
Requirements	
Appendix I: Training	These are the expected training requirements for the CMS.
Requirements	
Appendix J:	On this form, the Proposer must respond and submit the
Configuration	completed form with its proposal.
Requirements:	
Appendix K:	On this form, the Proposer must complete the form and submit the
Proposers	completed form with its proposal.
Acceptance of Terms	
and Conditions	
Attachment 1:	These rules govern this solicitation.
Administrative Rules	
Governing RFPs (IT	
Goods and Services)	
Attachment 2: JBE	If selected, the person or entity submitting a proposal (the
Standard Terms and	"Proposer") must sign a JBE Standard Form agreement
Conditions	containing these terms and conditions (the "Terms and
	Conditions").
Attachment 3:	On this form, the Proposer must complete the Certifications Form
General	and submit the completed form with its proposal.
Certifications Form	
Attachment 4: Iran	On this form, the Proposer must complete the Certifications Form
Contracting Act	and submit the completed form with its proposal.
Certification Form	
Attachment 5: Small	The Proposer must complete this form only if it wishes to claim
Business Declaration	the small business preference associated with this solicitation.
Attachment 6: Payee	This form contains information the JBE requires in order to
Data Record Form	process payments and must be submitted with the proposal.
Attachment 7: Unruh	The Proposer must complete the Unruh Civil Rights Act and
and FEHA	California Fair Employment and Housing Act Certification.
Certification	
Attachment 8:	These are the expected testing requirements for the CMS.
Testing	
Requirements  Attachment Or Cose	On this forms the Duenoscou worst recorded to the continue of the
Attachment 9: Case	On this form, the Proposer must respond to the cost portion of the
Management Solution Costing	RFP.
Solution Costing	
Matrix Attachment 10: RFP	On this form the Proposer must respond to the new cost resting
	On this form, the Proposer must respond to the non-cost portion of the PEP
Response Template	of the RFP.

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#### 5.0 PAYMENT INFORMATION

If a contract is awarded, the work of the Initial Term of the Agreement is expected to be **June 1, 2019** through **May 31, 2024 for \$210,000.00 Option** Terms 1,2,3,4 and 5 exercised at the sole option of the JCC, will range from **\$200,000.00** to **\$210,000.00** per Term. All terms should be included in the Cost Portion (see Section 8.2) of the proposal.

#### 6.0 PRE-PROPOSAL CONFERENCE

The JBE will hold a pre-proposal conference on the date identified in the timeline above. The pre-proposal conference will be held via conference call. Email Solicitations@jud.ca.gov to register for the conference, with "Registration for RFP CFCC-18-49-RB Pre-proposal Conference" in the subject line. Attendance at the Pre-proposal Conference is optional. Proposers are encouraged to attend.

#### 7.0 SUBMISSIONS OF PROPOSALS

- 7.1 Proposers should respond to each and every section of this RFP and all attachments, sub-exhibits and appendices. An RFP Response Template has been included for standardization of responses (Attachment 10). 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 five** (5) **copies** of the noncost portion of the proposal (Technical Proposal: Attachment 2 through 8, 10, and Appendices H, I, J and K). 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 JBE 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 five** (5) **copies** of the cost portion (Attachment 9) 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 JBE 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 USB memory stick/flash drive. The files must be in PDF, Word, or Excel formats.

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7.3 Proposals must be delivered by the date and time listed on the coversheet of this RFP to:

Judicial Council of California
Branch Accounting and Procurement
Attn: Bid Desk
RFP-CFCC-18-49-RB
455 Golden Gate Avenue, 6<sup>th</sup> Floor
San Francisco, CA 94102

- 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 <u>Non-Cost Portion</u> (Technical Proposal: Attachment 2 through 8, 10, and Appendices H, I, J and K). the following information must be included in the noncost portion of the proposal. A proposal lacking any of the following information may be deemed non-responsive.
- a. The Proposer's name, address, telephone and fax numbers, and federal tax identification number. Note that if the Proposer is a sole proprietor using his or her social security number, the social security number will be required before finalizing a contract.
- b. Name, title, address, telephone number, and email address of the individual who will act as the Proposer's designated representative for purposes of this RFP.
- c. Model number(s), specifications, or other description of the goods the Proposer proposes to supply to the JBE, including warranty information.
- d. Names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Proposer has provided similar goods. The JBE may check references listed by the Proposer.
- e. For each key staff member: a resume describing the individual's background and experience, as well as the individual's ability and experience in conducting the proposed activities.
- f. Proposed method to complete the work.
  - i. See Appendix H: Business and Functional / Non-Functional Requirements
  - ii. See Appendix J: Configuration Requirements

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g. Acceptance of the Terms and Conditions.

- i. Included in Attachment 2 and Appendix K (as a single document), the Proposer must check the appropriate box and sign the form. If the Proposer marks the second box, it must provide the required additional materials. An "exception" includes any addition, deletion, or other modification.
- ii. If exceptions are identified, the Proposer must also submit (a) a red-lined version of the Terms and Conditions that implements all proposed changes, and (b) a written explanation or rationale for each exception and/or proposed change.
- iii. Note: A material exception to a Minimum Term will render a proposal non-responsive.
- h. Certifications, Attachments, sub-attachments, appendices and other requirements.
  - i. The Proposer must complete the General Certifications Form (Attachment 3) and submit the completed form with its proposal.
  - ii. 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.
  - iii. Copies of the Proposer's (and any subcontractors') current business licenses, professional certifications, or other credentials.
  - iv. Proof of financial solvency or stability (e.g., balance sheets and income statements).
  - v. The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification (Attachment 7) and submit the completed certification with its bid.
- 8.2 <u>Cost Portion</u>. The following information must be included in the cost portion of the proposal (Attachment 9: Case Management Solution Costing Matrix).

IT Goods:

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i. The cost per unit for the goods described in the non-cost information.

ii. CMS Application Software Licensing – Supply any and all estimated software application costs.

#### IT Services:

- i. Professional Services Supply any and all estimated Professional Services costs by implementation phase and activity in Attachment 9, Tab 3, section 1, as well as any and all assumed JCC participation in Attachment 9, Tab 3, Section 2
- ii. Maintenance and Support Supply seven years of costs for Maintenance and Support.

**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 ninety (90) days following the proposal due date. In the event a final contract has not been awarded within this period, the JBE 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 at the 3<sup>rd</sup> floor Conference Center of the JCC from 10:30 am to 11:30 am PST.

The JBE 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 JBE will post an intent to award notice at the courts website.

CRITERION	MAXIMUM NUMBER OF POINTS
Contract Terms: Degree to which the Proposer accepts contract terms including compliance with regulatory and statutory requirements (Attachment 2)	8
Meeting Business Requirements (Appendix H) and Deployment Services deliverables:	34

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CRITERION	MAXIMUM NUMBER OF POINTS
<ul> <li>Degree to which the Proposer's proposed solution meets the functional requirements.</li> <li>Capacity to manage and execute a successful implementation and smooth migration from any existing platforms</li> </ul>	
Deployment Services Proposal: Ability to manage and execute a successful implementation and smooth migration from any existing platforms	8
Cost: Overall Cost, including any ongoing support and maintenance that may be required by the JCC or its agents	50
Total Points	100

#### 11.0 INTERVIEWS

The JBE may conduct interviews with 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 a demonstration. The interview may also require a demonstration of equivalence if a brand name is included in the specifications. The interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the JBE's offices. The JBE will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The JBE 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 JBE 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 JBE's right to disclose information in the proposal, or (b) requiring the JBE 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

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The JCC has waived the inclusion of DVBE participation in this solicitation.

#### 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 JBE'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 JBE'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 JBE 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 MISREPREPRETATION IN CONNECTION WITH THE SMALL BUSINESS PREFERNCE 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 <a href="https://www.courts.ca.gov/documents/jbcl-manual.pdf">www.courts.ca.gov/documents/jbcl-manual.pdf</a>). 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. The deadline for the JBE to receive a solicitation specifications protest is indicated above. Protests must be sent to:

Judicial Council of California **Branch Accounting and Procurement** ATTN: Protest Hearing Officer RFP-CFCC-18-49-RB 455 Golden Gate Avenue, 6th floor San Francisco, CA 94102