

RFP Title: Case Management Billing Solution for Juvenile Dependency Attorneys
in the State of California
RFP Number: CFCC-2021-107RB

Appendix F
RFP Response Template

REQUEST FOR PROPOSALS RESPONSE TEMPLATE

[PROPOSER INSERTS COMPANY NAME]

REGARDING:

**CASE MANAGEMENT BILLING SOLUTION FOR JUVENILE
DEPENDENCY ATTORNEYS FOR THE STATE OF CALIFORNIA**

RFP NO. CFCC – 2021-107RB

PROPOSAL DUE:

DECEMBER 3, 2021, NO LATER THAN 3:00 P.M. PACIFIC TIME

1.0 EXECUTIVE SUMMARY

Instructions: This section should be a seven (7) to ten (10) page summary of the key aspects of Proposer’s response to this Request for Proposal (RFP) and the principal advantages to the court.

- 1.0 Overview of Proposed Statewide Deployment of Case Management Billing Solution.
- 1.1 Approach to meet Deployment Objectives within two months of signing contract. Examples include data collection methods, project/team organization, and time estimates
- 1.2 Overview of Proposer Qualifications.
- 1.3 Confirmation of Contract Scope and Term.
- 1.4 Benefits to the JCC and the Attorney Users.

2.0 MINIMUM QUALIFICATIONS AND PROPOSER PROFILE

2.1 Minimum Requirements to Qualify

Instructions: In the following sections, Proposer must provide responses to the minimum requirements to qualify for participation in the RFP process. Answer **Yes or No** to the following questions.

Table 1. Minimum Requirements to Qualify

Criteria		Response (Yes/No)
2.1.1	Will your organization act as a prime contractor if subcontractors are required to provide in scope services?	
2.1.2	Are the proposed Proposer facilities for providing services to the Judicial Branch all located within the continental United States or territories and staffed by U.S. located personnel?	
Can you certify to the best of your knowledge that your organization or any of its officers:		
2.1.3	Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency?	
2.1.4	Have not within a five (5) year period preceding this RFP been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property?	
2.1.5	Have not within a five (5) year period preceding this RFP had one or more public transactions (Federal, State, or local) terminated for cause or default?	

2.2 Organization Overview

Instructions: In the following sections Proposer must provide all information requested regarding Proposer’s unique capabilities as an information technology (IT) Proposer.

2.2.1 Proposer Company Overview

Table 2. Company Overview

Company Name	
RFP Response lead/account executive name, title, and contact information:	
Industry (NAICS) (North American Industry Classification System)	
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.)	
Fiscal 2020 company revenue	
Fiscal 2020 company net income	
Headquarters Location	
Date Founded	
Company Ownership (i.e., private/public, joint venture)	
Number of years Proposer has been providing Application Software and Application User Training services	
Number of employees: Total:	
Service Delivery Locations in the Continental United States	
Name, title, address, telephone number, and email address of the individual who will act as Proposer’s designated representative for purposes of this RFP.	
Model number(s), specifications, or other description of the goods the Proposer proposes to supply to the JBE, including warranty information.	

2.2.2 References

Instructions to Proposer: Provide at least **three** references of customers with comparable scope of service. Include a detailed overview of each contract including the project plan used to deliver the service.

Table 3. Reference 1

Reference # 1	
Customer Name	
Industry	

Reference # 1	
Contact Name and Title	
Address	
Telephone	
Proposer Project Manager Name	
Length of Time Providing Software Package	
Average Annual Contract Value	
Current Contract Duration (in months)	

Table 4. Reference 2

Reference # 2	
Industry	
Contact Name and Title	
Address	
Telephone	
Proposer Project Manager Name	
Length of Time Providing Software Package	
Average Annual Contract Value	
Current Contract Duration (in months)	

Table 5. Reference 3

Reference # 3	
Industry	
Contact Name and Title	
Address	
Telephone	
Proposer Project Manager Name	
Length of Time Providing Software Package	
Average Annual Contract Value	
Current Contract Duration (in months)	

2.3 Resumes

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.

2.4 Use of Subcontractors

Instructions to Proposer: Use the table below for a listing of proposed subcontractors if any. Provide a table for each subcontractor proposed.

Table 6. First Proposed Subcontractor

First Proposed Subcontractor (if applicable)	
Subcontractor Name	
Fiscal 2020 Company Revenue	
Fiscal 2020 Company Net Income	

Company ownership (i.e., private/public, joint venture)	
Headquarters Location	
Date Founded	
Number of employees	
Products or Services to be provided to Court	
Experience of subcontractor in performing the services to be provided	
Experience Proposer has partnering with this subcontractor in the past	
Locations where work is to be performed	

Table 7. Second Proposed Subcontractor

Second Proposed Subcontractor (if applicable)	
Subcontractor Name	
Fiscal 2020 Company Revenue	
Fiscal 2020 Company Net Income	
Company ownership (i.e., private/public, joint venture)	
Headquarters Location	
Date Founded	
Number of employees	
Products or Services to be provided to Court	
Experience of subcontractor in performing the services to be provided	
Experience Proposer has partnering with this subcontractor in the past	
Locations where work is to be performed	

3.0 CONFORMANCE WITH REQUIREMENTS RESPONSE

3.1 Requirements Response

Instructions: Please reference the technical requirement(s) listed in **Section 2.4** of the RFP. Each requirement should be addressed individually, and responses should be made directly in each appendix of this RFP. The requirement documents and file types are listed below:

- Appendix A - Business and Functional / Non-Functional Requirements, Worksheets 1 and 2 (File type: .xlsx)
- Appendix B - Training Requirements (File type: .docx)
- Appendix C - Configuration Requirements (File type: .xlsx)
- Appendix D – Case Management Solution Costing Matrix (File type: .xlsx)
- Appendix E - Testing Requirements (File type: .docx)
- Appendix F – RFP Response Template (File type: .docx)

3.2 Deployment Services

Instructions: Please reference the attachment, Appendix A and the Deployment Services requirements beginning in Section 2.7 of the RFP. Please list and describe any approaches, methodologies, and exceptions.

3.2.1 Deployment Approach

Instructions: In the section below, provide an overview of Proposer’s deployment approach. See Sections 2.7 to 2.7.1 of the RFP for guidance.

3.2.2 Organization Chart

Instructions: Provide an organizational chart that clearly identifies the account team and roles that will support the CMS deployment. Include the names of Proposer Key Employees and Staff Positions.

3.2.3 Proposed Staffing and Biographies

Instructions: In this section below, provide an overview of Proposer’s proposed key personnel. Provide resumes of the key personnel identified.

3.3 CMS Deployment Management Tools

Instructions: In the table below, provide information regarding the automated tools the Proposer will use in the delivery of the CMS. Note: Attach and reference additional information where required.

Table 8. CMS Deployment Management Tools

CMS Deployment Management Tools	Product Name & Version	Describe Functions & Features (including manual and automated functions / integration points with other tools)	Expected Number of Licenses Required
Proposer Tools			
Project Management			
SLA Monitoring & Reporting			

CMS Deployment Management Tools	Product Name & Version	Describe Functions & Features (including manual and automated functions / integration points with other tools)	Expected Number of Licenses Required
Testing Tools			
Knowledge Management			
Change Management			
Account Management			
Training Software			
Other (describe)			

4.0 OTHER

Instructions: The JBE considers Proposer to agree to all other requirements not addressed specifically in the previous sections of this document unless identified herein. Absence of issues will constitute agreement for those terms not herein addressed and will be off the table for further negotiation.

5.0 SUPPORTING INFORMATION

Instructions: The JBE expects that Proposer will provide additional information to further clarify its response.

5.1 Additional Information for Solution Proposals

5.1.1 Application Deployment Management

5.1.2 Application Deployment

5.1.3 Contract Relationship Management

5.2 Proposer Assumptions

END OF ATTACHMENT