

Exhibit B

Evaluation Criteria & Proposal Submission Forms

Section A-1 - Methodologies

Section A-2 – Organizational Experience

Section A-3 – Proposer’s Acceptance of, or Exceptions to, JCC Terms and Conditions

Section A-4 – Viability of Firm

Evaluation Criteria & Proposal Submission Forms
Section A-1

Reference #	Evaluation Criterion: Methodologies
A-1	<p>Maximum Points for this Criterion: <u>10 Points</u> (out of 100 possible points)</p>
<p>Proposal Requirements: Proposers must describe and discuss their methodologies for providing the services and activities (and for meeting business and technical aspects) identified in Exhibit A (Business and Technical Requirements), Exhibit C (Scope of Work), Exhibit D (Service Level Requirements), and Exhibit E (Report Requirements).</p>	
<p>Proposer must complete the following:</p>	
<p>Sourcing: Describe and discuss your methodology for providing the services and activities identified in Exhibit A (Business and Technical Requirements), Exhibit C (Scope of Work), Exhibit D (Service Level Requirements), and Exhibit E (Report Requirements). that are required to support the Judicial Council. The description and discussion should include, but not be limited to: (1) summary of proposed solutions and benefit to JCC; (2) solution approach and strategy; and (3) how the overall program will be managed by the proposer.</p> <p>The Judicial Council assumes that Proposer will be able to meet all requirements set forth in Exhibit D (Service Level Requirements) and Exhibit E (Report Requirements), unless Proposer otherwise notes specific exceptions in its Proposal.</p> <p>If the Proposer plans to use subcontractors for any of the services or work pursuant to this RFP, also provide the following information:</p> <ul style="list-style-type: none"> • The full legal name, address, contact person, and telephone number of each subcontractor • The portions of the work to be done by the subcontractors. • How and why these subcontractors were selected. • Resumés of each major subcontract participant; and • Description of how subcontracted work will be controlled, monitored, and evaluated by the Proposer. 	

End of Evaluation Criterion A-1

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 Section A-2**

Reference #	Evaluation Criterion: Organizational Experience
A-2	Maximum Points for this Criterion: <u>12 Points</u> (out of 100 possible points)
<p>Proposal Requirements: Proposers must demonstrate their experience in delivering the requested services by (1) identifying their methodologies and processes that differentiate them from other vendors; (2) providing examples of related programs they have provided for past or current clients; and (3) summarizing the experience of Key Staff being assigned to the proposed program.</p>	
<p>Proposer must complete the following:</p>	

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Part I – Describe your organization’s methodology for managing similar programs, including what characteristics of your organization’s support methodology and internal management processes distinguish you from other vendors that provide these services.

Part II – References: Provide a description of up to **three (3)** business engagements where you have provided services substantially similar or identical to those requested here. Describe the dates and duration of these engagements. Provide at least one reference name and the contact information for an individual from the organization you serviced who is knowledgeable with the details of the engagement and who is willing to talk to the Judicial Council regarding this engagement.

The JCC reserves the right to use the information gained from the reference Company in the evaluation process.
NOTE: PROPOSALS ARE SUBJECT TO DISCLOSURE PURSUANT TO APPLICABLE LAW, INCLUDING RULE 10.500 OF THE CALIFORNIA RULES OF COURT.

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Part III – Key Staff: (1) Identify and designate individual(s) that will serve as Key Staff and their specified role for the Proposer in a subsequent agreement (if agreement is awarded to Proposer). (2) Provide detailed and complete resumes documenting the background and professional expertise of each individual that the Proposer is designating. (3) Identify how long each of the designated Key Staff has been serving in their specified roles. If less than two-years for any designated Key Staff, describe the reasons for such a short tenure, and identify how long their predecessor(s) served in those roles, and why the predecessor left that role. Describe and discuss the Proposer’s specific plans for ensuring stability of Key Staff for the duration of a prospective agreement.

End of Evaluation Criterion A-2

**Evaluation Criteria & Proposal Submission Forms
Section A-3**

Reference #	Evaluation Criterion:	Proposer’s acceptance of, or exception(s) to, JCC Terms and Conditions
A-3	Maximum Points for this Criterion:	___ <u>10 Points</u> ___ (out of 100 possible points)
<p>Proposal Requirements: Proposers must either indicate acceptance of the JCC Terms and Conditions, as set forth in Attachment 2, or clearly identify exceptions to the JCC Terms and Conditions.</p> <p>An “exception” includes any addition, deletion, or other modification.</p> <p>Note: A material exception, as determined by the Judicial Council in its absolute and sole discretion, to any of the Terms and Conditions may render a proposal non-responsive.</p> <p>If exceptions are identified, Proposers must also submit:</p> <ul style="list-style-type: none"> • a red-lined version of Attachment 2 (in Microsoft Word format) that clearly tracks and identifies all proposed changes (additions, deletions, or any revised language) to the attachment (i.e., the main agreement and any appendices, annexes and exhibits attached thereto), and • a written summary to substantiate each individual proposed change, including <ul style="list-style-type: none"> (i) the relevance of the change, and (ii) the vendor’s rationale for proposing the change. <p>Notwithstanding any other provision in this RFP, the Judicial Council reserves the right at its discretion to negotiate any or all items with individual Proposers, including the right to propose or require additional terms and conditions for the agreement prior to agreement execution.</p>		
Proposer must complete the following:		
Provide a completed and signed Attachment 3.		
<p>If proposing exceptions, submit red-lined text of <i>Attachment 2 (JCC Terms and Conditions)</i> in Microsoft Word format [Red-lined text of <i>JCC Terms and Conditions</i> must clearly track and identify all proposed changes to the terms and conditions, including any additions, deletions, or revised language. DO NOT INSERT EMBEDDED DOCUMENTS OR INSERT LINKS TO DOCUMENTS.]:</p>		

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If proposing exceptions, submit written summary of each proposed change here [For each individual proposed change, the written summary must identify the specific reference/section/sub-section number, and include (i) relevance of the change, and (ii) rationale for proposing the change]:

End of Evaluation Criterion A-3

**Evaluation Criteria & Proposal Submission Forms
Section A-4**

Reference #	Evaluation Criterion: Viability of Firm
A-4	Maximum Points for this Criterion: <u>5 Points</u> (out of 100 possible points)
Proposal Requirements: Proposers must demonstrate that they are a stable, long-term, viable business entity that provides services as an integral part of their core business, and that they are directed by long-term experienced executives and Key Staff with expertise and understanding of operational managed services.	
Proposer must complete the following:	
Part I – Company Information: Provide the legal business name of the company, including the type of business entity. If the company is a corporation, identify the state in which the company is incorporated. Describe and discuss the number of years your company has been in business, indicating how long you have been providing managed services, including whether managed services is the company’s sole core business. If not the sole core business, describe the other core businesses and how managed services fits into the company’s organizational model. Identify all mergers, acquisitions, and initial public offerings that have occurred with your firm since January 2013. Provide a statement of any bankruptcies or lawsuits filed against the Proposer, and a detailed listing of the adverse action, cause, number, and jurisdiction in which the matter was filed, including current status. Provide a description of the outcome of any such legal action where there was a finding against the Proposer or a settlement. Identify the company’s key executives and provide a brief description of their backgrounds.	
Part II – Financial Stability: Provide the latest 3-years of financial reports (audited financials, if available; if audited financials are not available, then reviewed financials will be acceptable). PROPOSALS ARE SUBJECT TO DISCLOSURE PURSUANT TO APPLICABLE LAW, INCLUDING RULE 10.500 OF THE CALIFORNIA RULES OF COURT.	

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Part III – Turnover Rate of Executives and Key Staff: Describe and discuss the turnover rate of key executives and the designated Key Staff members. Describe and discuss the company’s key executive/Key Staff retention philosophy.

Part IV – Additional Documents: Identify and attach any additional documents such as the Proposer’s/subcontractor(s) California contractor’s license(s), or other documents or certifications as required to perform the Work identified in the Proposal.