

REQUEST FOR PROPOSALS

*SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO*

**REGARDING:**

RFP 19-21 CLOUD-BASED IVR JURY SYSTEM

**PROPOSALS DUE:**

**JANUARY 22, 2019** NO LATER THAN **3:00 P.M.** PACIFIC TIME

1. **BACKGROUND INFORMATION**

The Superior Court of California, County of San Bernardino (“Court”) is seeking quotes from qualified persons or entities (hereinafter referred to as “Bidder” or “Bidders”) with expertise in providing Information Technology (IT) services to replace the Court’s existing Interactive Voice Recognition (IVR) and Call Center systems for Jury Services (hereinafter referred to as “IVR Jury Services System”) and move it to a cloud-based solution. The IVR Jury Services System needs to be a full functioning multi-media center solution that will handle all forms of customer contacts, traditional IVR capabilities, outbound dialing capabilities and the ability to manage other forms of customer communications (in and out). The IVR Jury Services System should also provide for features that will allow Court resources to handle routine maintenance of the system and allow for forecasting trends such as predicting future call volumes and handling times, as well as the ability to integrate the solution with other standards-based platform/software for greater system flexibility.

The type of award anticipated is Firm Fixed Price for an initial term of one (1) year with two (2) consecutive one (1) year options to extend exercisable at the sole discretion of the Court. A copy of this solicitation will be posted on the following websites: [*https://caleprocure.ca.gov/pages/Events-BS3/event-search.aspx*](https://caleprocure.ca.gov/pages/Events-BS3/event-search.aspx)and [*http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx*](http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx).

1. **DESCRIPTION OF GOODS AND/OR SERVICES**

See Exhibit A: Statement of Work and Exhibit A1: IVR Call Scripts Configurations.

1. **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** |
| --- | --- |
| RFP issued**:** | January 7, 2019 |
| Deadline for questions | January 10, 2019 |
| Questions and answers posted | January 14, 2019  *3:00 PM Pacific Time* |
| **Latest date and time proposal may be submitted** | **January 22, 2019**  ***3:00 PM Pacific Time*** |
| Anticipated interview dates, if required (*estimate only*) | Week of  January 22, 2019 |
| Evaluation of proposals (*estimate only*) | Week of  January 28, 2019 |
| Public opening of cost proposals | January 31, 2019  *3:00 PM Pacific Time* |
| **EVENT (timeline continued)** | **DATE** |
| Notice of Intent to Award (*estimate only*) | February 1, 2019 |
| Negotiations and execution of contract (*estimate only*) | February 8, 2019 |
| Contract start date (*estimate only*) | February 15, 2019 |
| Contract end date (*estimate only if all options exercised*) | February 14, 2022 |

1. **RFP ATTACHMENTS**

| **ATTACHMENT** | **DESCRIPTION** |
| --- | --- |
| Attachment 1 - Administrative Rules RFQs-IFBs-RFPs | These rules govern this solicitation. **Please read carefully.** |
| Attachment 2 – General Terms and Conditions/Defined Terms | If selected, the person or entity submitting a proposal must sign an agreement containing these terms and conditions. |
| Attachment 3 – Acceptance of Terms and Conditions | Form to indicate Bidder’s acceptance of the terms and conditions. |
| Attachment 4 – General Certifications Form | Form to indicate Bidder’s agreement on required general certifications. |
| Attachment 5 – Good Standing Form | Form to indicate Bidder’s good standing. |
| Attachment 6 – Small Business Declaration | Form for Bidder to claim the small business preference associated with this solicitation. |
| Attachment 7 – Unruh Civil Rights Act and California Fair Employment and Housing Act Certification | Form for Bidder to certify Unruh Civil Rights Act and California Fair Employment and Housing Act compliance. |
| Exhibit A: Statement of Work | Work to be performed. |
| Exhibit A1 - IVR Call Scripts Configurations | IVR call scripts for Work to be performed. |
| Exhibit B: Payment Provisions | This form contains information regarding contemplated payment terms and requirements to process invoices for payment. |
| Exhibit C: Bidder’s Cost Worksheet | Excel worksheet for Bidder to enter its cost proposal. |

1. **PAYMENT INFORMATION**

See Exhibit B: Payment Provisions.

1. **PRE-PROPOSAL CONFERENCE**

None required.

1. **SUBMISSION OF PROPOSALS**
   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.
   2. The Bidder must submit its proposal in two parts, the non-cost portion and the cost portion:
      1. The Bidder must submit **one (1) paper original** of the non-cost portion of the proposal. The original must be signed by an authorized representative of the Bidder. 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 Bidder must write “non-cost” and the RFP title and number on the outside of the sealed envelope.*
      2. The Bidder must submit **one (1) paper original** of the cost portion of the proposal. The original must be signed by an authorized representative of the Bidder. 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 Bidder must write “cost” and the RFP title and number on the outside of the sealed envelope.*
         1. The Bidder must submit **an electronic version of the entire proposal** on CD-ROM or USB Flash Drive with the cost portion. The files contained on the CD-ROM or USD Flash Drive should be in PDF, Word, or Excel formats.
   3. Proposals must be delivered by the date and time listed on the coversheet of this RFP to:

Superior Court of California, County of San Bernardino

Attn: Purchasing

247 West Third Street, 11th Floor

San Bernardino, CA 92415-0066

(909) 708-8747

* 1. Late proposals will not be accepted.
  2. Only written proposals will be accepted. Proposals must be sent by registered or certified mail, courier service (e.g. FedEx or UPS), or delivered by hand. Proposals may not be transmitted by fax or email. *The RFP title and number must be stated on the outside of the delivery envelope or package.*

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1. **PROPOSAL CONTENTS**

All information submitted in proposal must be clearly legible.

* 1. Non-cost Portion. The following information must be included in the non-cost portion of the proposal. A proposal lacking any of the following information may be deemed non-responsive:
     1. Bidder’s legal name, address, and telephone number.
     2. Name, title, address (if different), telephone number, and email address of the individual who will act as the Bidder’s designated representative for the purposes of this RFP.
     3. 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.
     4. Names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Bidder has conducted similar services. The Court may check references listed by the Bidder.
     5. Proposed method to complete the work. *Please pay attention to criteria to be scored in Section 10.0 below.*
     6. Attachments 3-7.

Bidder must include the following properly completed attachments or exhibits:

* + - 1. Acceptance of Terms and Conditions
      2. General Certifications Form
      3. Good Standing Form
      4. Small Business Declaration. Bidder must complete this form and submit the completed form with its proposal only if it wishes to claim the small business preference associated with this solicitation.
      5. Unruh Civil Rights Act and California Fair Employment and Housing Act Certification. Bidder must complete this form and submit the completed form with its proposal only if its cost proposal exceeds $100,000.00, including the initial term and all options.
    1. Copies of the Bidder’s (and any subcontractors’) current business licenses, professional certifications, or other credentials relevant to the goods and/or services being provided.
  1. Cost Portion. The following information must be included in the cost portion of the proposal:
     1. A full explanation of all budget line items in a narrative entitled “Budget Justification.”

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.

1. **OFFER PERIOD**

A Bidder’s proposal is an irrevocable offer for ninety (90) days following the proposal due date. In the even a final contract has not been awarded within this period, the Court reserves the right to negotiate extensions to this period.

1. **EVALUATION OF PROPOSALS**
   1. The Court will evaluate the proposals as described in the Administrative Rules (Attachment 1) on a 100 point scale using the criteria set forth in the table below:

| **CRITERION** | **maximum number of points** |
| --- | --- |
| Quality of plan to provide services and staff | 20 Points |
| Experience on similar assignments/client references | 20 Points |
| Time required to complete work | 10 Points |
| Cost spread between Deliverables | 10 points |
| Acceptance of the Court’s terms and conditions | 10 Points |
| Cost | 30 Points |

* 1. The Court will first evaluate the non-cost portion of the proposals and publish the results of said evaluation on the date noted in Section 3.0 at the following location: <http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx>.
  2. The Court will then publically open the cost portion of the proposals on the date and at the time noted in Section 3.0 at the following Court location:

San Bernardino Justice Center

1. West Third Street, 11th Floor Reception Area

San Bernardino, CA 92415

* 1. Award, if made, will be to the highest scored proposal. If a contract will be awarded, the Court will post a Notice of Intent to Award at <http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx>.

1. **INTERVIEWS**

The Court may conduct interviews with Bidders 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 Court’s offices. The Court will not reimburse Bidders for any costs incurred in traveling to or from the interview location. The Court will notify eligible Bidders regarding interview arrangements.

1. **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 Bidder 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 Bidder 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. Bidders are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

1. **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 located at <http://www.sb-court.org/GeneralInfo/Purchasing.aspx>. The Bidder will receive a small business preference if, in the Court’s sole determination, the Bidder has met all applicable requirements. If the Bidder 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 Bidder 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 Bidder wishes to seek the small business preference, the Bidder must complete and submit with its proposal the Small Business Declaration (Attachment 5). The Bidder 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 Bidder 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 Bidder not receiving the small business preference.

If the Bidder receives the small business preference, (i) the Bidder 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.

1. **DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE**

The Court’s DVBE participation goal is a minimum of 3% of the value of all Court contracts in any given fiscal year (July 1 thru June 30). To implement the DVBE program the Court may grant Bidders that provide DVBE participation a DVBE incentive. The Court DVBE incentive for procurements awarded to the lowest responsible Bidder may be initially 3%. The Court DVBE incentive for procurements awarded to the highest scoring Bidder/Bidder may also initially be 3%. Any Bidder claiming the DVBE incentive for any procurement must submit the appropriate certifications as part of a complete bid package. The Court will not apply the DVBE incentive without the proper certifications on file.

1. **PROTESTS**

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract Manual (see www.courts.ca.gov/documents/jbcl-manual.pdf). Failure of a Bidder 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 Court to receive a solicitation specifications protest is **the proposal due date and time**. Protests should be sent to:

Superior Court of California, County of San Bernardino

Attn: Steve Pascover, Advisory Attorney

247 West Third Street, 11th Floor

San Bernardino, CA 92415-0302

Throughout the review process, the court has no obligation to delay or otherwise postpone an award of contract based on a Bidder protest. In all cases, the court reserves the right to make an award when it is determined to be in the best interest of the court to do so.