

ATTACHMENT 20 – NON-COST RESPONSE TEMPLATE

Instructions

To facilitate the evaluation of Vendor responses, RFP responses must follow this template. Vendor responses may reference attachments. Vendor response should be well organized and labeled to facilitate courts review of the response.

1.0 Executive Summary

Instructions: This section should not exceed five (5) pages and should include a summary of the key aspects of Vendor’s response to this Request for Proposal (RFP) and the principal advantages to the court.

1.0 Overview of Proposed CMS Deployment Solution

1.1 Approach to Meet CMS Deployment Objectives

1.2 Overview of Vendor Qualifications

1.3 Confirmation of Contract Scope and Term

1.4 Benefits to Court

2.0 Minimum Qualifications and Vendor Profile

2.1 Minimum Requirements to Qualify

Instructions: In the following sections, Vendor 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?	select
2.1.2	Are the proposed Vendor facilities for providing services to the participating entities all located within the continental United States or territories and staffed by U.S. located personnel?	select
2.1.3	Are you willing to place Key Employees in Court facilities throughout California	select
2.1.4	Has your organization, acting as the prime contractor, entered into at least three (3) major application deployments, similar in scope to Attachment 8 Deployment Services Statement of Work within the last five (5) years where the following is true for each contract:	select
2.1.4.1	The contract value of each was at least \$1,000,000 for application deployment services excluding application development services	select

Criteria		Response (Yes/No)
2.1.4.2	The contract included the provision of Deployment Services where total revenue derived from the Deployment Services was at least 25 percent of total annual contract value, and included data conversion, data exchanges, user training, and application configuration to support business work flow/process	select
2.1.5	Can you certify to the best of your knowledge that your organization or any of its officers:	select
2.1.5.1	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?	select
2.1.5.2	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?	select
Additional Certifications		
2.1.6	Attachment 3 Proposers Acceptance of Terms and Conditions is included with response and signed. If Proposer does not accept terms and conditions, Proposer has submitted (i) a red-lined version of Attachment 2 that identifies all proposed changes, and (ii) a written explanation or rationale for each exception or proposed change.	select
2.1.7	Proposer has signed and submitted Attachment 4, General Certifications	select
2.1.8	Proposer claims to be a small business? If Yes, Proposer has completed, signed and included Attachment 5 Small Business Declaration.	select
2.1.9	Proposer has completed, signed and attached Attachment 6 Payee Data Record.	select
2.1.10	Propose has completed, signed and attached Attachment 7 Iran Contracting Act Certification	select
End of Table		

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) Vendor.

2.2.1 Vendor 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)	
Fiscal 2014 company revenue	
Fiscal 2014 company net income	

Headquarters Location	
Date Founded	
Company Ownership (i.e. private/public, joint venture)	
Number of years Vendor has been providing Application Deployment and Application User Training services	
Number of employees: Total: Deployment Services:	
Service Delivery Locations in the Continental United States	
End of Table	

Table 3. Details of Revenue Stream

Service Category	Revenue in US \$
Business Process Outsourcing Services Total	
IT Outsourcing Services Revenue Total	
Deployment Services Revenue	
Network, Desktop Management Services Revenue	
Data Center, Network Management Services Revenue	
Applications Development Services Revenue	
Application Maintenance Services Revenue	
US Customer IT Outsourcing Services Revenue	
Non US Customer IT Outsourcing Services Revenue	
Commercial IT Outsourcing Services Revenue	
Federal IT Outsourcing Services Revenue	

Service Category	Revenue in US \$
State Government IT Outsourcing Services Revenue	
Local Government IT Outsourcing Services Revenue	
System Integration Services Revenue Total	
Other IT Services Revenue Total (list below)	
End of Table	

2.2.2 References

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

Table 4. Reference 1

Reference # 1	
Customer Name	
Industry	
Contact Name and Title	
Address	
Telephone	
Vendor Project Manager Name	
Average Annual Contract Value	
Contract Value of each of the following service:	
Deployment Services	
Others	
Contract Durations (in months)	
Subcontractors and services provided by each:	
(list)	
End of Table	

Table 5. Reference 2

Reference # 2	
Customer Name	
Industry	
Contact Name and Title	
Address	
Telephone	
Vendor Project Manager Name	
Average Annual Contract Value	
Contract Value of each of the following service:	
Deployment Services	
Others	
Contract Durations (in months)	
Subcontractors and services provided by each:	
(list)	
End of Table	

Table 6. Reference 3

Reference # 3	
Customer Name	
Industry	
Contact Name and Title	
Address	
Telephone	
Vendor Project Manager Name	
Average Annual Contract Value	
Contract Value of each of the following service:	
Deployment Services	
Others	
Contract Durations (in months)	
Subcontractors and services provided by each:	
(list)	
End of Table	

Table 7. Reference 4

Reference # 4	
Customer Name	
Industry	
Contact Name and Title	
Address	
Telephone	
Vendor Project Manager Name	
Average Annual Contract Value	
Contract Value of each of the following service:	
Deployment Services	
Others	
Contract Durations (in months)	
Subcontractors and services provided by each:	
(list)	
End of Table	

2.3 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 8. Proposed Subcontractors

Proposed Subcontractors	
Subcontractor Name	
Fiscal 2014 Company Revenue	
Fiscal 2014 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 Vendor has partnering with this subcontractor in the past	
Locations where work is to be performed	
End of Table	

2.4 Vendor Business Profile and Strategy.

This section should be limited to 3-5 pages

2.4.1 Vendor Current Market Position and Strategy

2.4.2 Vendor Future Vision and Strategy

2.4.3 Relevant Vendor Certifications and Honors

Instructions: Describe your certifications and honors relating to the proposed Services.

2.4.3.1 Vendor Certifications or Affiliations

Table 9. Vendor Certifications and/or Experience

Vendor Certifications			
ITEM #	Certification or Training	Certification or Training Date (MM/DD/YY)	Vendor Response (include training information for any proposed individual staff members)
1.			
2.			
3.			

4.			
5.			
6.			
7.			
End of Table			

3.0 Conformance with Requirements Response

3.1 Pricing Acceptance and Exceptions

Table 10. Submit in single sealed envelope, separate from the non-cost portion

ITEM #	CRITERIA	RESPONSE YES/NO
3.1.1	Proposer has completed and signed Attachment 19. The original cost portion of the proposal (and the copies thereof) must be submitted to the Court on BidSync as indicated, as well as by mail 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. Participating entities may withhold up to at least 10% contingency on all progress payments payable upon project completion.	select
3.1.2	Also include with 3.1.1, Proposer has addressed, signed and included, how option year pricing will be addressed. Terms must be specific and all inclusive to provide Court the information to calculate the 10 (ten) year cost. If cost increases are proposed, they must be tied to a reasonable inflation index.	select
3.1.3	Also include with 3.1.1, a description of the product warranty included under the proposed price.	select
3.1.4	Contractor has clearly defined a Milestone Payments schedule based on Key Deliverables and progress objectives and has included this with Attachment 19, pursuant to Section 3.1.1.	select
3.1.5	Proposer has included a detailed description of the post implementation maintenance and support program (items included and excluded).	select

3.2 Requirements Response Template A

Instructions: Attachments 9 and 13 must be completed using the table below and submitted in the Excel Format. Responses should be made directly in each attachment, using the applicable attachment format below:

Table 11

Mandatory	Req # or Name	Yes/No, In Progress	Response with Explanation for Business and Functional Requirements. (If YES or NO, LEAVE LINE ITEM BLANK)
Yes	1.1.1	select	
Yes	1.1.2	select	

Requirements attachments are listed below:

ITEM #	CRITERIA	RESPONSE YES/NO
3.2.1.	Proposer has addressed and submitted the technical response required by Attachment 9 Business and Functional Requirements per the format outlined above.	select
3.2.5	Proposer has addressed and submitted the technical response required in Attachment 13 Desktop Requirements per the format outlined above.	select

3.3 Requirements Response Template B

Instructions: Attachments 10, 11, 12 and 14 must be completed using the table below and submitted in the Excel Format. Each requirement should be addressed individually and responses should be made directly in each attachment, or using the applicable attachment format below:

Table 12

Mandatory	Req # or Name	Yes/No, In Progress	Response with Explanation for Requirements.
Yes	1.1.1	select	
Yes	1.1.2	select	

Requirements attachments are listed below:

Table 13

		RESPONSE YES/NO
3.2.2	Proposer has addressed and submitted the technical response required in Attachment 10 Testing Requirements per the format outlined above.	select
3.2.3	Proposer has addressed and submitted the technical response required in Attachment 11 Configuration Requirements per the format outlined above.	select
3.2.4	Proposer has addressed and submitted the technical response required in Attachment 12 Training Requirements per the format outlined above.	select
3.2.6	Proposer has addressed and submitted the technical response required in Attachment 14 Architecture and Security Requirements per the format outlined above.	select

3.4 Deployment Services

Instructions: Please reference the Deployment Services requirements in Attachment 8. Please list and describe any approaches, methodologies and exceptions. Deployment must show how vendor will complete installation in 18 months.

3.4.1 Deployment Approach

- 3.4.1.1 Project Management to deploy in 18 months.
- 3.4.1.2 Solution Environment Design, Hosting Options, Set-up and administration, System admin manuals, Technical Staff Training
- 3.4.1.3 Functional Requirements Gap Analysis
- 3.4.1.4 Requirements /"To Be" Analysis & Processes
- 3.4.1.5 Implementation Plan
- 3.4.1.6 Integrations Plan
- 3.4.1.7 Post-implementation support and project close-out including maintenance plan and services.
- 3.4.1.8 Address compliance with Attachments 16, 17 and 18

3.5 Proposed Staffing

Instructions: In the sections below, provide an overview of Vendor’s proposed approach to meet the Roles and Responsibilities in Attachment 8.

3.5.1 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 Vendor Key employees and staff positions.

3.5.2 Biographies

Instructions: For the Key Roles assigned to this project, as described in Attachment 8, provide resumes of Vendor’s proposed Personnel including years of experience in role, last two accounts in role, references from those account, and experience with deployment of case management systems.

3.5.2.1 Project Sponsor

3.5.2.2 Project Manager

3.5.2.3 Architect

3.5.2.4 Business Resources (please insert as many as necessary)

3.5.2.5 Testing Resources (please insert as many as necessary)

3.5.2.6 Training Resources (please insert as many as necessary)

3.5.2.7 Programming Resources (please insert as many as necessary)

3.6 CMS Deployment Management Tools

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

Table 14 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
Vendor Tools			
Project Management			
SLA Monitoring & Reporting			
Testing Tools			
Knowledge Management			
Change Management			
Account Management			
Training Software			

Other (describe)			
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4.0 Other

Instructions: The Establishing 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 Establishing JBE expects that the Proposer will provide additional information to further clarify its response and elucidate the benefits to the Establishing JBE.