

# REQUEST FOR PROPOSALS

---

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF  
ALPINE**

**REGARDING:**

JURY MANAGEMENT SYSTEM AND SERVICES

RFP NUMBER: ALPINE-032025

**PROPOSALS DUE:**

April 30, 2025, NO LATER THAN 3:00 P.M. PACIFIC STANDARD TIME

**TO:** POTENTIAL PROPOSERS  
**FROM:** The Judicial Council of California, on behalf of Alpine Superior Court of California.  
**DATE:** March 24, 2025

**SUBJECT / PURPOSE:** The Judicial Council of California (JCC) is conducting this RFP on behalf of Superior Court of California, County of Alpine. Alpine Superior Court seeks to enter into a “Master Agreement” with a qualified vendor with expertise in providing competitive proposals for a comprehensive Jury Management System and Services.

**ACTION REQUIRED:** You are invited to review and respond to this RFP as posted on the Alpine Superior Court’s website at [www.Alpine.courts.ca.gov](http://www.Alpine.courts.ca.gov).  
Project Title: Jury Management System and Services

**RFP Number: ALPINE-032025**

**DUE DATE AND TIME FOR SUBMITTAL OF QUESTIONS:** The deadline for submitting questions pertaining to the solicitation document:  
**April 11, 2025, no later than 3:00 p.m. (PST)**

**PROPOSAL DUE DATE AND TIME:** Proposals must be received by:  
**April 30, 2025, no later than 3:00 p.m. (PST)**

**INTERVIEWS/DEMOS (estimate only. May be requested if the court needs clarification):** **May 9, 2025 (estimate only)**  
Meeting format to be provided at a later time. One hour will be allotted per vendor.

**Attachments**

- Attachment 1      Administrative Rules Governing RFPs
- Attachment 2      Judicial Branch Entity Standard Terms and Conditions
- Attachment 3      Proposer's Acceptance of Terms and Conditions
- Attachment 4      General Certifications Form
- Attachment 5      Small Business Declaration
- Attachment 6      Payee Data Record Form
- Attachment 7      Electronic Funds Transfer Authorization Form
- Attachment 8      Darfur Contracting Act Certification
- Attachment 9      Bidder Declaration
- Attachment 10     DVBE Declaration
- Attachment 11     Unruh Civil Rights Act and California Fair Employment and Housing Act Certification

**Exhibits**

- Exhibit 1      Cost Proposal Sheet
- Exhibit 2      Proposer's Response Template

**A. BACKGROUND INFORMATION**

A.1 The Superior Court of California, County of Alpine (“Judicial Branch Entity” or “JBE”) is seeking Proposals from a qualified person or entity with expertise in providing competitive proposals for a comprehensive Jury Management System and Services. Court Address: 14777 State Route 89, Markleeville, CA, 96120.

A.2 The JBE anticipates awarding one contract for an initial five-year term, with three consecutive one-year options for a potential maximum of eight years. Each of the three option terms may be exercised at the JBE’s sole discretion. The type of award anticipated is Firm Fixed Pricing for the initial term.

A.3 The Court’s existing jury management system is a custom-built access database access located on-premises with built-in VBA functions for easy, mass form creation, printing, and summons tracking. This system must be manually updated annually to reflect current juror pools and summons status.

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

B.1 The JBE seeks goods meeting the following specifications:

Proposer to provide general specifications of any equipment/hardware needed for this software system. Brand name can be used for the purpose of example.

B.2 The JBE seeks the services of a person or entity with expertise in the following:

**1. JURY MANAGEMENT SYSTEM (“JMS”) GENERAL REQUIREMENTS:**

- 1.1. Provide efficient, reliable service to handle approximately 1,000 processing requests each month and accept simultaneous real-time updates from multiple locations, using any number of workstations, without significant performance degradation.
- 1.2. Process juror attendances at a rate sufficient to record the attendance of 100 jurors, on average, arriving within a 45-minute time period.
- 1.3. Automate to the greatest extent possible the Court’s jury functions and processes.
- 1.4. Pool processing that includes random selection of prospective juror pools, summons/questionnaire production, and processing requests.
- 1.5. Panel processing that includes random selection of panels for voir dire, tracking prospective jurors in and out of voir dire, production of “in court” documentation, and jury empanelment.
- 1.6. Attendance processing that includes juror attendance, generation of failure to appear documentation, and fully auditable financial management/payment processing, including the generation of audit reports.
- 1.7. Text messaging (SMS) notifications to prospective jurors:

- 1.7.1.** User defined messages for JMS used for SMS messages.
  - 1.7.2.** Send different messages to juror's cell phone number depending on their juror status i.e. summoned, needs to report or excused.
  - 1.7.3.** Embed data in the message that is specific to each juror.
  - 1.7.4.** Court shall be able to send prospective jurors texts or a mass text to a group, pool or case.
  - 1.7.5.** Jurors shall have the ability to sign up for SMS notifications via the web and also be able to opt-out via text reply to stop.
- 1.8.** Ability to:
  - 1.8.1.** Adapt to Court's Jury business practices.
  - 1.8.2.** Process juror source lists.
  - 1.8.3.** Process groups of jurors.
  - 1.8.4.** Process 1-Step Questionnaires.
  - 1.8.5.** Maintain juror information.
  - 1.8.6.** Display and maintain a complete juror history.
  - 1.8.7.** Process and manage pre-service jurors.
  - 1.8.8.** Record in-service jurors.
  - 1.8.9.** Record basic Case information and form jury panels.
  - 1.8.10.** Compute and maintain case juror costs.
  - 1.8.11.** Capture juror related statistics.
  - 1.8.12.** Calculate juror's traveled mileage reimbursement using Juror's mileage actually traveled in attending and returning from court pursuant to CCP 215 (c).
  - 1.8.13.** Indicate/Track when a trial lasts 40 days or more and automatically produce 1099 form.
  - 1.8.14.** Produce Summon with ability to print to Court printers.
  - 1.8.15.** Produce notices or letters with ability to print to Court printers.
  - 1.8.16.** Produce jury management reports.
  - 1.8.17.** Provide reporting and Excel export for payment processing.

**1.8.18.** Provide the ability to automate the DMV, County Registrar of Voters and FTB updates bi- annually at no cost.

**1.8.19.** Provide built-in capability to combine juror records from the DMV, County of Registrar of Voters and FTB juror data sources into a single unique list.

**1.8.20.** Provide mechanisms to easily remove or exclude juror records who do not reside in the county.

**1.8.21.** Provide the Court with system administration capabilities.

## **2. JURY SUMMONS/POST SUMMONS REQUIREMENTS:**

- 2.1.** Support a one-trial/one-day term of service and a one-step summons/affidavit mail-out and provide flexibility to use any other term of service by providing the ability for Court users to specify the next date of required service on a daily basis.
- 2.2.** Assign a unique number to identify each record housed in the Master Pool and used throughout the JMS. This number is referred to as the "Juror ID Number".
- 2.3.** Provide the ability to search for individual records by the Juror ID Number, Juror Badge Number or Juror name.
- 2.4.** Randomly select prospective jurors, for summoning individually or in Court user-defined groups, from the Master Pool; and the ability to print to Court printers or Adobe PDF files. This process shall include the ability to select prospective jurors automatically from specified zip code areas.
- 2.5.** Allow Court users to manually add any individual record in the Master Pool to an existing pool.
- 2.6.** Provide export files (.txt, .xml, .csv, Excel, Word, .pdf).
- 2.7.** Record prospective jurors' service term availability from juror responses on their affidavits.
- 2.8.** Incorporate the time qualification information in the juror's voir dire or biographical data, which can be used to electronically select time qualified panels to be sent to courtrooms.
- 2.9.** Make a random selection of a Court user specified number of pool members, with specific terms of availability for assignment to a time-qualified panel.
- 2.10.** Ability for Court users to review and change a summoned juror record. Where the participant is to be excused, disqualified, transferred or deferred, the Court user shall be able to specify a reason for the excuse, disqualification, transfer or deferral. The reason, date, and authorized Court user who granted the excuse, disqualification, transfer or deferral must be automatically added to the juror history.
- 2.11.** Functions for excusing, transferring and deferring a juror. In the case of a jury

service deferral, the Court user shall be able to select a date from available dates within an administratively defined range. All juror transactions that involve excusing, disqualifying, transferring, deferring or re-summonsing will allow the Court user the option to automatically generate a confirmation notice to the prospective juror by selecting a method of notification (e.g. telephone, email, SMS and postcard).

- 2.12. Create download files used to generate mailed notifications
  - 2.13. Ensure that deferred jurors, at the time a new jury pool is created, are selected before additional prospective jurors are randomly selected from the Master Jury Pool. Jurors deferred from one summons period to the next shall be automatically included in the output file for generating summons.
  - 2.14. Maintain in the juror's record; the juror's first, middle and last name separately, suffix designations, address, status, government employee indicator, court assignment, voir dire information, mileage, report date(s), deferments, juror ID number, employer information, telephone numbers (home, work, cell), payment or fee waiver information, failure to appears, days served and additional items related to their service, including next attendance date, call-in or report indicator, status, case number, regular or special pool indicator, room number, check-in and check-out times, deferral date, a free form notes entry scroll box, number of attendances, number of times deferred, and number of times FTA.
  - 2.15. Collect juror email addresses.
  - 2.16. Allow Court users to develop and issue juror surveys and exit questionnaires.
  - 2.17. Track and automatically record each step of the juror's service history beginning with summon through payment. History shall continue through the juror's lifetime and be accessible by the person's pool number, name, status, report date, or juror ID number. History shall also reflect if the person was disqualified, excused, transferred or deferred, and the reason why. All history documentation shall include the authorized Court user who performed each transaction.
  - 2.18. Archive, reactivate and modify entire pools, as well as maintain juror history.
  - 2.19. Allow the juror to waive per diem fees, mileage reimbursement, or both.
  - 2.20. Proposer to provide general specifications of any equipment/hardware needed for this software system. Brand name can be used for the purpose of example.
- 3. JUROR ATTENDANCE REQUIREMENTS:**
- 3.1. Track the juror from the time of summons through completion of juror's service.
  - 3.2. Process attendance information from scanned badges when a prospective juror arrives by posting date and time information in their attendance record. Provisions to ensure that the prospective jurors being scanned in are reporting on the date they are expected. If the arriving prospective juror is not expected on that date, the system shall allow the Court user to add the juror to the pool.

- 3.3. Print a bar code badge or summons form for a juror who fails to bring in their badge.
  - 3.4. Court users can assign jurors to panels of any size (up to 100) either by a process of random selection or by group and track the panel members to and from the courtroom. Assignments may be subject to conditions such as time-availability. Such conditional assignments shall be drawn from lists provided by the system, based on affidavit information and will be managed by Court users.
  - 3.5. Each court location is able to list and graphically display the number of individuals and groups scheduled to appear, the number actually checked-in, the number currently checked out of the assembly room, the number presently in courtrooms, the total number of prospective jurors currently available for selection on a voir dire panel, and the total number of prospective jurors in the assembly room that have not yet been selected to serve on at least one panel for voir dire.
  - 3.6. Display a list and total number of all prospective jurors scheduled to appear or who are on-call for a given appearance day. From this list, Court users must be able to identify the number of jurors available to report.
  - 3.7. Allow prospective jurors to be moved from on-call to reporting status and interface with an IVR and/or IWR system to notify participants of their jury status by telephone, email or text messaging.
  - 3.8. Allow returning a juror to the pool or completing their service when they return from a courtroom by scanning the juror ID on their bar-coded badge.
  - 3.9. Allow Court users to dismiss jurors by groups or individually from the pool to complete their service.
  - 3.10. Allow time sequencing and escalation of failure to respond letters.
  - 3.11. Print a verification letter of jury attendance for the juror to provide to their employer or for their own records.
  - 3.12. Update or correcting a person's name and address, and automatically update mileage and geographical information. This updated information shall be recorded in the juror's history record indicating previous name or address information.
- 4. JUROR PAYMENT/ACCOUNTING REQUIREMENTS:**
- 4.1. Contain all accounting fields required by the Court to perform jury payment functions.
  - 4.2. Contain data tables configurable by the Court for per diem rates and mileage reimbursement rates by actual Juror's street address.
  - 4.3. Configurable to apply Court business rules for juror fees and mileage payments (current Court policy is that jurors do not receive fees or mileage payments for



the first day of jury service; however, business rules can change).

- 4.4.** Allow juror record payment adjustments for fees and mileage by authorized Court users, based on roles or profiles assigned to Court administrative users. All adjustments must be recorded in the juror's history.
- 4.5.** Have controls to ensure that a juror is not allowed to be paid for jury service on more than one case at a time. It shall also ensure that jurors cannot receive duplicate payments for any given payment date.
- 4.6.** Include all jury payment components required by the Court, including the creation of a Jury Payment Extract file. This file will be in conformance with existing Court formatting and layout requirements for interfacing into the State's financial system, Phoenix/SAP.
- 4.7.** The Jury Payment Extract shall include the ability to run both regular and supplemental payments, which can be run based on a specific date or date range designated by Court users. The supplemental payment runs shall have the ability to make payment adjustments or requests, which would be added to a juror's history as part of an audit trail.
- 4.8.** Provide an error or exception report for any juror payment record that exceeds the maximum amount.
- 4.9.** Provide jury payment reports that interface with the Jury Extract File for reconciliation. The reports shall be in a format accepted by the Court and be configurable/customizable by the Court and be exportable in Court specified formats (e.g. Word, Text, Excel, and PDF) to be saved on a local or network drive. The reports must reflect correct amounts per Court business rules for juror payments. For example, current Court policy is that jurors do not receive fees or mileage payments for the first day of jury service, only for the second day and forward.
- 4.10.** The system shall produce the following reports:
  - 4.10.1.** Summary Report – summarizes jury payment separated by Case Type/Fund, and then Fees and Mileage. This report should be configurable to accept any range of payment dates. It should also validate the Jury Payroll Extract file generated at any given time.
  - 4.10.2.** Detailed Report – reflects each juror's payment record, by Fees and Mileage payments. This report should be configurable to accept any range of payment dates. It should also validate any Jury Payroll Extract file generated at any given time.
  - 4.10.3.** Supplemental Payroll Report – reflects supplemental payments made to jurors based on fees/mileage adjustments, or payment of fees/mileage previously waived by juror. This report should be configurable to accept any range of payment dates. It should also validate any Supplemental Jury Payroll Extract file generated for any given time period.

**4.10.4.** Audit Logs / User Reports – the system shall generate a log or audit report reflecting all Court users of the system who conduct payment activities in the JMS. The report should detail the employees' name, the payment activity recorded, as well as identify any payment adjustments or overrides performed in the JMS by the employee. The adjusted juror's record/identifier and date of transaction should also be included.

**4.10.5.** Any other report that may be required by the Court to include selectable data in JMS.

**4.10.6.** Allow all reports and logs to be printed to local and network printers.

**5. SYSTEM ADMINISTRATION & SECURITY REQUIREMENTS:**

**5.1.** Ability to designate two or more Court System Administrators who are able to:

**5.1.1.** Review and modify tables based on Court locations which may impact juror pay parameters.

**5.1.2.** Set parameters to include, but not be limited to, FTA deferrals, deferral guidelines, re- summoning exemption period, per diem amount and mileage amount.

**5.1.3.** Review and modify system maintenance tables.

**5.1.4.** Establish various levels of security groups (profiles) to accommodate the Court's unique operational requirements.

**5.2.** Audit feature for tracking Court user activity.

**6. TECHNICAL SPECIFICATIONS REQUIREMENTS:**

**6.1.** Support at least 500 summonses per year.

**6.2.** Support mobile devices, smart phones, tablets, etc.

**6.3.** Provide access to its features via API calls or web services.

**6.4.** Allow trial information updates from an SQL script, or stored procedure, etc.

**6.5.** Support all major Internet browsers which include, but not limited to Microsoft Edge, Google Chrome, Mozilla Firefox, and Apple Safari web browsers.

**6.6.** Provide security for web traffic with SSL Protocols acceptable to the Court.

**6.7.** Ability to host the application from an Azure cloud environment.

**6.8.** Desktop solutions must operate in Windows 7, 8, 10 & 11 as they become available.

**6.9.** Server(s) operating system solution must be a Windows Server environment using Windows 2022 or higher version.

- 6.10.** Database solution must use SQL 2022 or higher version.
- 6.11.** Server applications must be certified to use VMWare 6.7 server virtualization or higher.
- 6.12.** Must be IP4/6 capable.
- 6.13.** Provide business workflow of all processes and enhancements.
- 6.14.** Provide for a software and hardware setup in a production environment, as well as provide replicated/mirrored development and staging/testing environment.
- 6.15.** Provide an internal paperless optimal solution using the Court's Document Management System. All scanned documents should be categorized and indexed automatically using advanced scanning processes.
- 6.16.** Export data to external applications (.txt, .xml, .csv, Excel, Word, .pdf).
- 6.17.** Provide "canned reports" as well as Court user-defined and generated customized ad hoc reports, using mainstream report generating software tools, such as Crystal Reports and SQL Server Reporting Services.
- 6.18.** Ability for Court to write queries against the system's database to generate ad hoc reports, without compromising system response time.
- 6.19.** Provide patch fixes and software upgrades at regularly scheduled intervals (to be determined by the Court and Contractor), at no cost to the Court.
- 6.20.** Provide system availability and reliability 24 hours a day, 7 days a week, except for minimally scheduled down time for routine maintenance, as recommended by Contractor and agreed to by the Court.
- 6.21.** Provide an efficient, reliable system response time service with Court accepted response time from multiple court locations and provide the capability to use up to 10 workstations, if necessary, to process jurors simultaneously.
- 6.22.** The Court will own and have unrestricted access to the data within the database and system documentation for the jury system.
- 6.23.** Provide the functionality to archive all juror records on demand for a Court user-specified period of time and allow historical access to archived records. The archive function will allow the Court users to select pools, juries, and other groups, and delete part of the database, retaining only a predefined portion of the juror's history. The archive function will also allow the Court user to move specified juror records to other storage media.
- 6.24.** Provide the Court with a comprehensive, final detailed system design configuration, including the proposed solutions, prior to the start of system installation, and in accordance with an agreed upon delivery schedule for review and approval by the Court.

**7. SYSTEM ADMINISTRATION REQUIREMENTS:**

- 7.1. Provide backup procedures integrated with the Court's present backup procedures and methodology. This procedure shall allow unattended, daily back-up of the database, without bringing down the system's database.

**8. SYSTEM ADMINISTRATION TRAINING REQUIREMENTS:**

- 8.1. Provide a training plan and training to ensure that Court users can adequately perform all basic system related administrative, diagnostic, and proactive management functions, within the proposed solution.
- 8.2. Provide detailed system documentation that describes all system administration functions.
- 8.3. Provide the Court with one (1) electronic copy each of the User's Manual and the Systems Administration Guide.

**9. DATABASE ADMINISTRATION AND SECURITY REQUIREMENTS:**

- 9.1. Describe the proposed system's access and security control, including the types of access permitted, to include Court user roles (i.e., support staff, management staff, and system administration staff).
- 9.2. Provide the ability to administer Court users, limit their functional access corresponding to their assigned Court location and job description. Only those functions accessible to the Court user are to be displayed on the screen.
- 9.3. Provide activity logs of all Court user activities within the system.

**10. CONTRACTOR RESPONSE TO SYSTEM PROBLEMS:**

- 10.1. Provide implementation support and ongoing Production support, including without limitation telephone support, remote access support, or in-person support at the Court's location(s).
- 10.2. Provide documentation and instructions for recovering from a system crash or data corruption.
- 10.3. In the event of a system or database crash, provide database restoring procedures for immediate recovery following the restoration or correction of a hardware or software failure.

**11. WARRANTY SERVICE RESPONSE TO SYSTEM PROBLEMS:**

- 11.1. Warranty service shall include response to system problems in the following manner: Technical support service shall be available twenty-four (24) hours per day, seven (7) days per week.

**12. SERVICE RESPONSE TIME & REQUIREMENTS:**

- 12.1.** Response to major failure maintenance calls shall not exceed two (2) hours. Major Failure maintenance shall be defined as follows:
  - 12.1.1.** The entire system is inoperative.
  - 12.1.2.** Disruption in service to a single user of a material nature. Material nature shall mean the Court's operations are critically affected.
- 12.2.** Response to a minor failure shall not exceed the next business day following the report. Minor Failure shall be defined as follows:
  - 12.2.1.** Features within the system are not performing to specification.
- 12.3.** When a request for emergency service is received from the Court, Contractor agrees to respond within two (2) hours of request, twenty-four (24) hours per day, and seven (7) days per week.
- 12.4.** In the event of a system emergency, the Contractor shall: (i) prioritize Court's emergency; (ii) escalate within the Contractor's technical and management organizations as necessary to resolve the emergency; (iii) use its best efforts to correct the emergency within four (4) hours from receipt of notice of such emergency; and, (iv) maintain continuous work until the emergency is corrected to Court's satisfaction. In the event that any emergency is not corrected by the Contractor within twelve (12) hours from receipt of notice, the successful Contractor shall replace that portion of the system causing such emergency with new items of equipment or software within twenty-four (24) hours from receipt of the emergency. Contractor will provide an escalation call list.
- 12.5.** Should the condition require that Contractor take down the system for corrective maintenance, the Contractor shall first notify Court IT Management and obtain permission before proceeding.

**13. REPORTING TOOL REQUIREMENTS:**

- 13.1.** Describe the canned reports that are available to the Court. This description will include the type of report, the information provided in the report, the frequency of the report, the process to request the report, and the process used to deliver the report.
- 13.2.** Provide real time and historical reporting tools.
- 13.3.** Provide the capability for customized reports via report generating tools, such as Crystal Reports, and SQL Server Report Services.
- 13.4.** Standard reports shall:
  - 13.4.1.** Estimating juror needs from source lists.
  - 13.4.2.** Estimating juror needs on a quarterly, monthly, weekly, and daily basis.

- 13.4.3.** Provide the Court information regarding juror usage.
- 13.4.4.** Provide the Court information for budgeting purposes.
- 13.4.5.** Assist the Court in defending a jury challenge.
- 13.4.6.** Provide data to establish workload requirements that drive staffing needs and allocation.
- 13.4.7.** Provide data establishing historical experience regarding exemptions, excusing, postponing, deferring, etc.
- 13.4.8.** Provide data for performance and outcome measures, such as jury yields, days of service, etc.

### 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	<b>March 24, 2025</b>
Deadline for questions submitted to <a href="mailto:TCSolicitation@jud.ca.gov">TCSolicitation@jud.ca.gov</a>	<b>April 11, 2025, no later than 3:00 p.m. (PST)</b>
Questions and answers posted at: <a href="http://www.Alpine.courts.ca.gov">www.Alpine.courts.ca.gov</a> ( <i>estimate only</i> )	<b>April 18, 2025</b>
Final proposal due date and time- Non-cost and Cost Proposals are submitted in different mailboxes, please see below: <ul style="list-style-type: none"> <li>• <b>Non-cost Proposal-</b> Only must be submitted to- <a href="mailto:TCSolicitation@jud.ca.gov">TCSolicitation@jud.ca.gov</a></li> <li>• <b>Cost Proposal-</b> Only must be submitted to- <a href="mailto:TCAS-Alpine-032025-Cost-Proposals@jud.ca.gov">TCAS-Alpine-032025-Cost-Proposals@jud.ca.gov</a></li> </ul>	<b>April 30, 2025, no later than 3:00 p.m. (PST)</b>
Evaluation of proposals ( <i>estimate only</i> )	<b>May 2, 2025</b>
Anticipated interview dates may be requested by the court if clarification is needed. ( <i>estimate only</i> )	<b>May 9, 2025</b>
Technical (non-cost) scores posted at: <a href="http://www.Alpine.courts.ca.gov">www.Alpine.courts.ca.gov</a> ( <i>estimate only</i> )	<b>May 16, 2025</b>
Public cost opening may be viewed via Microsoft Teams at 1:00 p.m. (PST), using Meeting number: <b>Microsoft Teams <a href="#">Need help?</a></b> <b><a href="#">Join the meeting now</a></b> Meeting ID: 216 588 923 041 Passcode: 7Fr9BU9D  <b>Dial in by phone</b> <a href="tel:+14159060569">+1 415-906-0569</a> , <a href="tel:+1212058089">212058089</a> # United States, San Francisco <a href="#">Find a local number</a> Phone conference ID: 212 058 089# <b>Join on a video conferencing device</b>	<b>May 20, 2025, 1:00 p.m. (PST)</b>

EVENT	DATE
Tenant key: 178332609@teams.bjn.vc Video ID: 117 131 686 0 <a href="#">More info</a>	
Notice of Intent to Award ( <i>estimate only</i> )	<b>May 26, 2025</b>
Master Agreement executed by this deadline ( <i>estimate only</i> )	<b>June 1, 2025</b>

### 3.1 NONEXCLUSIVE

Any contract awarded as a result of this RFP is nonexclusive. The JBE may have other contracts for the same or similar services, and the JBE reserves the right to provide or have others provide the same or similar services.

### 3.2 BACKGROUND CHECKS AND OTHER REQUIREMENTS

Proposer will conduct background checks on all of its employees or contractors that will provide services to JBE, at no cost to JBE. JBE may require Proposer to exclude any of its employees or contractors from providing services based on the background check results, or if an employee or contractor refuses to undergo a background check.



#### 4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (IT Goods and Services):	These rules govern this solicitation.
Attachment 2: JBE Standard Terms and Conditions	If awarded the contract, the person or entity submitting a proposal (the "Proposer") must sign this Judicial Branch Entity (JBE) Standard Form agreement. Proposer must submit a redlined version of the Attachment 2, if you are taking any exemptions to the standard terms.
Attachment 3: Proposer's Acceptance of Terms and Conditions	On this form, the Proposer must indicate acceptance of the Terms and Conditions or identify exceptions to the Terms and Conditions as specified immediately above.  <b>Note: Any material exceptions to the Terms and Conditions will result in a negative factor in the evaluation and could render the proposal nonresponsive.</b>
Attachment 4: General Certifications Form	The Proposer must complete the General Certifications Form and submit the completed form with its proposal.
Attachment 5: Small Business Declaration	The Proposer must complete this form only if it wishes to claim the small business preference associated with this solicitation and submit the completed form with its proposal.
Attachment 6: Payee Data Record Form	This form contains information the JBE requires in order to process payments, and the Proposer must submit the completed form with its proposal.
Attachment 7: Electronic Funds Transfer Authorization	The Proposer must complete and submit this form only if it wishes to be enrolled in Electronic Funds Transfer Authorization program to receive electronic funds.
Attachment 8: Darfur Contracting Act Certification	The Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.
Attachment 9: Bidder Declaration	The Proposer must complete the Bidder Declaration and submit the completed form only if the Proposer wishes to claim the DVBE incentive associated with this RFP.
Attachment 10: DVBE Declaration	The Proposer must complete the DVBE Declaration and submit the completed form only if the Proposer wishes to claim the DVBE incentive associated with this RFP. <b>NOTE:</b> The DVBE Declaration is not required if Proposer will qualify for the DVBE incentive using a BUP on file with DGS.
Attachment 11: Unruh Civil Rights and FEHA Certification	The Proposer must complete the Unruh Civil Rights and FEHA Certification and submit the completed certification with its proposal.
Attachments 3-11 must be signed by an authorized representative of the Proposer.	
Exhibit 1: Cost Proposal Sheet	The Proposer must complete and submit the Cost Proposal Form with its proposal.

Exhibit 2: Proposer Response Template	The Proposer must complete and submit the Proposer Response Template with its proposal.
--	---

## 5.0 PAYMENT INFORMATION

- 5.1 The JBE does not pre-pay for any goods and services.
- 5.2 The vendor will be paid at a fixed annual rate to perform the Services described in RFP section 2.0.
- 5.3 The method of payment to the contractor will be monthly in arrears, upon presentation of each invoice for any work completed.
- 5.4 For services performed and accepted, the vendor shall submit a monthly invoice to the JBE which will be paid within 30 days of the date of invoice.
- 5.5 All fees and charges proposed shall be inclusive of any and all anticipated clerical support, materials, fees, overhead, profits and other costs and/or expenses incidental to the performance of the specified requirements of this RFP.

## 6.0 SUBMISSIONS OF PROPOSALS

### 6.1 Proposal Structure

Proposers should respond to every section of this RFP, all attachments and all exhibits. Proposers may download the original RFP documents from the JBE website [www.Alpine.courts.ca.gov](http://www.Alpine.courts.ca.gov). These documents will be available in whole as the RFP and individually for your review and use.

A Proposer Response Template has been included (Exhibit 2) for standardization of responses. Proposals should provide straightforward, concise information that satisfies the requirements of Section 7.0, Non-Cost Proposal Contents, below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed in conformity to the RFP's instructions and requirements and completeness and clarity of content.

- 6.2 The Proposer must submit its proposal electronically in two parts, the non-cost portion and the cost portion, no later than the due date and time per Section 3.0, Proposed Procurement Schedule, in this RFP.
  - a. **Non-Cost Portion of the Proposal:** The **non-cost portion** electronic files must be in searchable PDF, Word or Excel formats. An electronic signature by an authorized representative of the proposer must be included. Electronic signatures may be digital or a scanned image of a handwritten signature that is attached to an electronic document and delivered by electronic means. All electronic signatures shall comply with California Civil Code, title 2.5, sections 1633.1-1633.17 (Uniform Electronic Transactions Act), title 2, sections 22000-22005, and Government Code 16.5. The Proposer must submit the **non-cost portion** to the TCSolicitation

mailbox (link included in Table 3.0 Proposed Procurement Schedule).

- b. **Cost Portion of the Proposal:** The **cost portion** electronic files must be in searchable PDF, Word, or Excel format. The source Excel file used to prepare responses to Exhibit 1 must also be submitted. The Proposer must submit the **cost portion** to the TCAS-Alpine mailbox (link included in Section 3. Proposed Procurement Schedule).

**6.3** Late proposals will not be accepted.

## **7.0 PROPOSAL CONTENTS**

### **NON-COST (TECHNICAL) PROPOSAL CONTENTS**

The following information must be included in the **non-cost portion** of the proposal (Exhibit 2). A proposal lacking any of the following information may be deemed non-responsive.

#### **7.1 Proposer Information**

*(Please respond in Exhibit 2, Section 1.0)*

- 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. The name, title, address, telephone number, and email address of the individual who will act as a Proposer's designated representative for purposes of this RFP.

#### **7.2 Company Overview and Financial Information**

*(Please respond in Exhibit 2, Section 2.0 and 3.0)*

- a. Company name, headquarters location, date founded, ownership (private/public, joint venture, etc.), organization structure, number of years providing jury management system and services and total number of employees.
- b. Financial statements for the last three years together with a current certification made by the chief financial officer stating that statements are current, accurate and complete with the exception of any materials adverse changes specifically described that have occurred in the status and/or prospects of Proposer since the effective date of the most recent financial statements.

### **7.3 Business Disputes**

*(Please respond in Exhibit 2, Section 4.0)*

Provide details of any disciplinary actions or other administrative action taken by any jurisdiction or person against Proposer. List and summarize all judicial or administrative proceedings involving your sourcing activities, claims of unlawful employment discrimination, and antitrust suits in which you have been a party within the last five years. If Proposer is a subsidiary, submit information for all parent companies. If the Proposer uses subcontractors, associated companies, and consultants that will be involved in any phase of this Agreement, include pertinent subcontractor information.

### **7.4 Overview of Proposer's Qualifications**

#### **7.4.1 Résumés**

*(Please respond in Exhibit 2, Section 5.1)*

For each key staff member: a résumé of key staff members as outlined in Exhibit 2, Proposer Response Template, describing the individual's education and experience, as well as the individual's ability and experience related to the services described in RFP section 2.0.

#### **7.4.2 Certifications**

*(Please respond in Exhibit 2, Section 5.3)*

Proposer must provide a description of any certifications and honors that Proposer has received that are related to the requested services.

#### **7.4.3 References**

*(Please respond in Exhibit 2, Section 5.3)*

Names, addresses, and telephone numbers of a minimum of three customers for whom the Proposer has provided similar goods and services.

### **7.4 Acceptance of Terms and Conditions.**

On Attachment 3, 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.

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.

The JBE prefers Proposers that will accept the Terms and Conditions without exceptions. Proposer's Acceptance of Terms and Conditions (Attachment 3), including the Standard Form agreement in Attachment 2, shall be an affirmative factor in the evaluation of the Proposal. By contrast, significant exceptions to the Terms and Conditions shall be a negative factor in the evaluation.

**Note: Any material exceptions to the Terms and Conditions will result in a negative factor in the evaluation and could render the proposal nonresponsive.**

#### **7.5 Certifications, Attachments and Other Requirements.**

- a. *Proof of Good Standing.* 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.
- b. Business License. Copies of the Proposer's (and any subcontractors') current business licenses, professional certifications or other credentials.
- c. Certificate of Insurance. Copy of the Proposer's Certificate of Insurance.
- d. General Certifications. Proposer must complete and submit the General Certifications Form (Attachment 4).
- e. Small Business Declaration. Proposer must complete and submit the Small Business Declaration (Attachment 5) only if it wishes to claim the small business preference associated with this solicitation.
- f. Payee Data Record. Proposer must complete and submit the Payee Data Record Form (Attachment 6).
- g. Electronic Funds Transfer Authorization Form (Attachment 7)
- h. Darfur Contracting Act Certification. Proposer must complete and provide the Darfur Contracting Act Certification (Attachment 8).
- i. Bidder Declaration. Proposer must complete and provide the Bidder Declaration (Attachment 9).

- j. DVBE Declaration. Proposer must complete and provide the DVBE Declaration (Attachment 10). **NOTE:** The DVBE Declaration is not required if Proposer will qualify for the DVBE incentive using a BUP on file with DGS.
- k. Unruh Civil Rights Act and California Fair Employment and Housing Act Certification. Proposer must complete and provide the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification (Attachment 11).

## 8.0 COST PROPOSAL CONTENTS

8.1 The Proposers shall complete the Cost Proposal Sheet (Exhibit 1) accurately and completely.

8.2 The proposer must complete Exhibit 1 – Cost Proposal Sheet.

8.3 All pricing shall remain firm for the initial three-year term (3) and the one (1) year option terms of the Master Agreement. Price increase requests for the option terms shall be submitted sixty days prior to the Master Agreement anniversary date. Documentation from the manufacturer supporting any price increases may be requested by the Court. Any price increases will be set forth in an amendment to the Master Agreement.

8.4 Pricing must include all charges, including but not limited to, freight and delivery, cost of materials and product, overhead, profits, and other costs or expenses.

**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 via Microsoft Teams at the date and time noted in RFP Section 3.0.

The JBE will evaluate the proposals on a 100-point scale using the criteria set forth in the table below. An award, if made, will be to the highest score proposal.

If a contract will be awarded, the JBE will post an Intent to Award notice at [www.Alpine.courts.ca.gov](http://www.Alpine.courts.ca.gov).

Category	Factors	Total Possible Points
Cost	Overall cost based on the fee structure described in the cost proposal (Exhibit 1)	30
Functionality, ease of use, scalability, support and customer care	Evaluation of the Proposer's ability, based on its organizational structure, to meet the requirements set forth in RFP Section 2.0	26
Quality of plan to provide services and staff	Evaluation of Proposer's ability to provide reports quality of services and staff	23
Experience of similar assignments, references	Degree to which the Proposer has performed work similar to the requirements set forth in RFP Section 2.0	8
Acceptance of Terms and Conditions	Level of Proposer's acceptance of Terms and Conditions (Attachment 3)	10
DVBE Incentive	DVBE incentive points are available to qualified Proposers	3

### 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 will be conducted via Microsoft Teams meeting. The JBE will notify eligible Proposers regarding interview arrangements.

### 12.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

PROPOSALS ARE SUBJECT TO DISCLOSURE TO THIRD PARTIES AND MEMBERS OF THE PUBLIC PURSUANT TO APPLICABLE LAWS, INCLUDING PUBLIC DISCLOSURE PURSUANT TO RULE 10.500 OF THE CALIFORNIA RULES OF COURT. Except as required by law, 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 may be disclosed in response to applicable public records requests, or as otherwise required by law. Such disclosure may be made regardless of whether the proposal (or portions thereof) is marked "confidential," "proprietary," "copyright ©," 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. Submission of any proposal pursuant to this RFP constitutes acknowledgment and consent by the Proposer to the potential public disclosure of its proposal content, as set forth in this Section 12. **Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.**

### 13.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE

Qualification for the DVBE incentive is not mandatory. Failure to qualify for the DVBE incentive will not render a proposal non-responsive.

Eligibility for and application of the DVBE incentive is governed by the JBE's DVBE Rules and Procedures. Proposer will receive a DVBE incentive if, in the JBE's sole determination, Proposer has met all applicable requirements. If Proposer receives the DVBE incentive, a number of points will be added to the score assigned to Proposer's proposal. The number of points that will be added is specified in Section 10.0 above.

To receive the DVBE incentive, at least 3% of the contract goods and/or services must be provided by a DVBE performing a commercially useful function. Or, for solicitations of non-IT goods and IT goods and services, Proposer may have an approved Business Utilization Plan ("BUP") on file with the California Department of General Services ("DGS").

If Proposer wishes to seek the DVBE incentive:

1. Proposer must complete and submit with its proposal the Bidder Declaration (Attachment 9). Proposer must submit with the Bidder Declaration all materials required in the Bidder Declaration.
2. Proposer must submit with its proposal a DVBE Declaration (Attachment 10) completed and signed by each DVBE that will provide goods and/or services in connection with the contract. If Proposer is itself a DVBE, it must complete and sign the DVBE Declaration. If Proposer will use DVBE subcontractors, each DVBE subcontractor must complete and sign a DVBE Declaration. **NOTE:** The DVBE Declaration is not required if Proposer will qualify for the DVBE incentive using a BUP on file with DGS.

Failure to complete and submit these forms as required will result in Proposer not receiving the DVBE incentive. In addition, the JBE may request additional written clarifying information. Failure to provide this information as requested will result in Proposer not receiving the DVBE incentive.

If this solicitation is for IT goods and services, the application of the DVBE incentive may be affected by application of the small business preference. For additional information, see the JBE's Small Business Preference Procedures for the Procurement of Information Technology Goods and Services.

If Proposer receives the DVBE incentive: (i) Proposer will be required to complete a post-contract DVBE certification if DVBE subcontractors are used; (ii) Proposer must use any DVBE subcontractor(s) identified in its proposal unless the JBE approves in writing the substitution of another DVBE; and (iii) failure to meet the DVBE commitment set forth in its proposal will constitute a breach of contract.

**FRAUDULENT MISREPRETATION IN CONNECTION WITH THE DVBE INCENTIVE IS A MISDEMEANOR AND IS PUNISHABLE BY IMPRISONMENT OR FINE, AND VIOLATORS ARE LIABLE FOR CIVIL PENALTIES. SEE MVC 999.9.**

#### **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 MISREPRESENTATION IN CONNECTION WITH THE SMALL BUSINESS PREFERENCE 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 Contract Manual (see [www.courts.ca.gov/documents/jbcl-manual.pdf](http://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.

Protests should be sent to:

Protests of an Intent to Award shall be filed with the JBE within five (5) working days after the Notice of Intent to Award is published. Protests must be sent electronically to: [TCsolicitation@jud.ca.gov](mailto:TCsolicitation@jud.ca.gov).