

RFQ Title: *Online Information Technology Training*

RFQ Number: *2017-010*

REQUEST FOR QUOTES

SUPERIOR COURT OF CALIFORNIA , SANTA BARBARA COUNTY

REGARDING:

ONLINE INFORMATION TECHNOLOGY TRAINING PROVIDER

RFP 2017-010

QUOTES DUE:

Wednesday, October 25 NO LATER THAN ***3:00*** P.M. PACIFIC TIME

1.0 BACKGROUND INFORMATION

1.1 Information technology (IT) is a constantly changing field. To successfully complete IT projects, staff need to complete training on existing and new technologies. Online training through a Training Management System has proven to be the most cost effective methodology for technical training and managing the training process.

2.0 DESCRIPTION OF GOODS AND/OR SERVICES

2.1 The JBE (Judicial Branch Entity) seeks goods and/or services meeting the following specifications:

Santa Barbara County Superior Court is seeking an online training provider to furnish information technology (IT) training to the court's 11 IT staff on an annual basis. Some of the training areas are:

- Software in use today including Microsoft Office Suite
- Software in use in the future Including Microsoft SharePoint and OneDrive
- Cloud computing
- Mobile computing
- Security strategies and technologies
- Networking
- Database management, including MS SQL
- IT Ops / administration including O365 Outlook Administration
- Software Development
- Web Design & Development
- As well as other topics.

The training topics described above shall be provided online with management of training staff in courses to be included.

3.0 TIMELINE FOR THIS RFQ

The JBE has developed the following list of key events related to this RFQ. All dates are subject to change at the discretion of the JBE.

EVENT	DATE
RFQ issued	<i>Tuesday, October 17, 2017</i>
Deadline for questions	<i>Friday, October 20, 2017, no later than 5:00 pm, Pacific Time</i>
Questions and answers posted http://www.sbcourts.org/gj/Purchasing/index.shtm	<i>Monday, October 23, 2017 by 5:00 pm Pacific Time</i>

EVENT	DATE
Latest date and time proposal may be submitted	<i>Wednesday, October 25, 2017, no later than 3:00 pm Pacific Time</i>
Evaluation of proposals (<i>estimate only</i>)	<i>Friday, October 27, 2017</i>
Negotiations and execution of contract (<i>estimate only</i>)	<i>Monday, October 30, 2017</i>
Contract start date (<i>estimate only</i>)	<i>Wednesday, November 1, 2017</i>
Contract end date (<i>estimate only</i>)	<i>October 31, 2018, with one or more options to renew.</i>

4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFQ and are posted on the JBE website in the following link <http://www.sbcourts.org/gi/Purchasing/index.shtm>:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFQs	These rules govern this solicitation. http://www.sbcourts.org/gi/Purchasing/TermsConditions/RFQAdministrativeRules.pdf
Attachment 2: JBE Standard Terms and Conditions – IT Goods and Services	If selected, the person or entity submitting a proposal (the “Proposer”) must sign a JBE Standard Form agreement containing these terms and conditions (the “Terms and Conditions”). http://www.sbcourts.org/gi/Purchasing/TermsConditions/ITTermsConds.pdf
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. http://www.sbcourts.org/gi/Purchasing/TermsConditions/ITAcceptance.pdf Note: A material exception to a Minimum Term will render a proposal non-responsive.
Attachment 4: General Certifications Form	The Proposer must complete the General Certifications Form and submit the completed form with its proposal. http://www.sbcourts.org/gi/Purchasing/TermsConditions/IT-Goods-and-Services-GeneralCertifications.pdf
Attachment 5: Bidder/Contractor Questionnaire	The Proposer must complete the Bidder/Contractor Questionnaire Form and submit the completed form with its proposal. http://www.sbcourts.org/gi/Purchasing/TermsConditions/BidderQuestionnaire.pdf
Attachment 6: DVBE Bidder Declaration	The Proposer must complete this form <i>only if it wishes to claim the DVBE incentive</i> associated with this solicitation. http://www.sbcourts.org/gi/Purchasing/TermsConditions/DVBEBidderDeclaration.pdf
Attachment 7: DVBE Declaration	The Proposer must complete this form <i>only if it wishes to claim the DVBE incentive</i> associated with this solicitation. http://www.sbcourts.org/gi/Purchasing/TermsConditions/DVBE-Declaration.pdf
Attachment 8: Small Business Declaration	The Proposer must complete this form <i>only if it wishes to claim the small business preference</i> associated with this solicitation. http://www.sbcourts.org/gi/Purchasing/TermsConditions/SmallBusinessDeclaration.pdf

5.0 PAYMENT INFORMATION

- a. Payment terms will be specified in any agreement that may ensue as a result of this RFQ.
- b. **THE COURT DOES NOT MAKE ADVANCE PAYMENT FOR SERVICES.** Payment is normally made based upon completion of tasks as provided in the contract between the Court and the selected Proposer. The Court may withhold ten percent of each invoice until receipt and acceptance of the final deliverable. The amount of the withhold may depend upon the length of the project and the payment schedule provided in the contract between the Court and the selected Proposer.

6.0 SUBMISSIONS OF BIDS

- 6.1 Bids should provide straightforward, concise information that satisfies the requirements of the "Bid Contents" section below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the RFQ's instructions and requirements, and completeness and clarity of content.
- 6.2 The Proposer must submit **one (1) original**. The original must be signed by an authorized representative of the Bidder. The bid must be submitted to the JBE via email to sbsolicitation@sbcourts.org, or by hard copy according to the instructions provided below in Section 6.3. The Bidder must write the RFQ title and number on the subject line of the email.
- 6.3 If Proposer chooses to submit the bid as a hard copy, the bid must be delivered by the date and time listed on the coversheet of this RFQ to:

Attn: Ammon M. Hoenigman
Procurement Specialist Sr.
Superior Court of Santa Barbara County
1100 Anacapa Street, 2nd Floor
Santa Barbara, CA 93101
- 6.4 Bids must be sent by courier service, (e.g. FedEx), delivered by hand, or by email to sbsolicitation@sbcourts.org.
- 6.5 Bids delivered by hand must be delivered Monday through Friday between 8:00 am and 3:00 pm. They must be delivered to the 2nd Floor Clerk's Office which is located in the center of the Historic Courthouse across from the spiral staircase at the address listed above in Section 6.3.
- 6.6 **Late bids will not be accepted.**

7.0 BID CONTENTS

- 7.1 The Proposer must complete the Bidder/Contractor Questionnaire Form and submit the completed form with its proposal.

<http://www.sbcourts.org/gi/Purchasing/TermsConditions/BidderQuestionnaire.pdf>

- 7.2. Acceptance of the Terms and Conditions.

<http://www.sbcourts.org/gi/Purchasing/TermsConditions/ITAcceptance.pdf>

- i. 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.
- ii. 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.
- iii. **Note: A material exception to a Minimum Term will render a proposal non-responsive.**

- 7.3 Certifications, Attachments, and other requirements.

- i. The Proposer must complete Attachment 4, the General Certifications Form and submit the completed form with its proposal.

<http://www.sbcourts.org/gi/Purchasing/TermsConditions/IT-Goods-and-Services-GeneralCertifications.pdf>

- ii. If tangible personal property is proposed the Proposer must submit with its proposal, for itself and each of its affiliates that make sales for delivery into California, a copy of either (i) a California seller's permit issued under Revenue and Taxation Code section 6066 et seq. or (ii) a certificate of registration issued under Revenue and Taxation Code section 6226.
- iii. 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.

- 7.4 Cost Portion. The following information must be included in the cost portion of the proposal.

- A. IT Goods:

- i. The pre-tax cost per unit for the goods described in the non-cost information.
- ii. Taxable and non-taxable items shall be separated by line item, and the taxable status shall be clearly indicated.

B. IT Services:

- i. A detailed line item budget showing total cost of the proposed services.
- ii. A full explanation of all budget line items in a narrative entitled "Budget Justification."
- iii. A "not to exceed" total for all work and expenses payable under the contract, if awarded.

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.

8.0 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.

9.0 EVALUATION OF PROPOSALS

The JBE will evaluate the proposals on a 55 point scale using the criteria set forth in the table below. Award, if made, will be to the highest-scored proposal.

CRITERION	MAXIMUM NUMBER OF POINTS
<i>Quality of topical documented offerings</i>	<i>5</i>
<i>Experience on similar assignments</i>	<i>5</i>
<i>Cost</i>	<i>25</i>
<i>Applicability of courses offered to Court Operations</i>	<i>10</i>
<i>Acceptance of the Terms and Conditions</i>	<i>5</i>
<i>Ability to meet timing requirements to complete the project</i>	<i>5</i>

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 may be conducted in person or by phone. If conducted in person, interviews will likely be held at the JBE's offices. The JBE will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The JBE will notify eligible Proposers regarding interview arrangements.

12.0 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 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 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 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. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

13.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE

- A. Qualification for the Disabled Veterans Business Enterprise (DVBE) incentive is not mandatory. Failure to qualify for the DVBE incentive will not render a proposal non-responsive.
- B. Eligibility for and application of the DVBE incentive is governed by the Court's DVBE Rules and Procedures. Proposer will receive a DVBE incentive if, in the Court's sole determination, Proposer has met all applicable requirements. If Proposer receives the DVBE incentive, the dollar amount of its proposal will be reduced (for evaluation purposes only) by an amount equal to 3% of the lowest responsible proposal, not to exceed \$50,000.
- C. To receive the DVBE incentive, at least 3% of the purchase order 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").
- D. If Proposer wishes to seek the DVBE incentive:
 - i. Proposer must complete and submit with its proposal, the DVBE Proposer Declaration. Proposer must submit with the DVBE Proposer Declaration all materials required in the DVBE Proposer Declaration.

- ii. Proposer must also submit with its proposal, a DVBE Declaration 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.
- E. Failure to complete and submit these forms as required will result in Proposer not receiving the DVBE incentive. In addition, the Court may request additional written clarifying information. Failure to provide this information as requested will result in Proposer not receiving the DVBE incentive.
- F. 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 Court's Small Business Preference Procedures for the Procurement of Information Technology Goods and Services.
- G. If Proposer receives the DVBE incentive: (i) Proposer will be required to complete a post-purchase order DVBE certification if DVBE subcontractors are used; (ii) Proposer must use any DVBE subcontractor(s) identified in its proposal unless the COURT 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.
- H. **Fraudulent misrepresentation in connection with the DVBE incentive is a misdemeanor and is punishable by imprisonment or fine, and violators are liable for civil penalties. See Military & Veterans Code section 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 MISREPRETATION IN CONNECTION WITH THE SMALL BUSINESS PREFERNCE 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 Contracting Manual (see www.courts.ca.gov/documents/jbcl-manual.pdf). Failure of a Proposer 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 JBE to receive a solicitation specifications protest is Monday, October 2, 2017, no later than 5:00 pm Pacific Time. Protests must be sent to:

Darrel E. Parker
Superior Court Executive Officer
312 East Cook Street
Santa Maria, CA 93454