**ATTACHMENT 9**

RFP Response Template

[Insert Company Name Here]

***PLEASE COMPLETE THIS TEMPLATE F O R E A C H S O L U T I O N***

***S U B M I T T E D***

Title: Ability-To-Pay On-Line Tool

RFP Number: CJS-2017-08-ML

## PROPOSALS DUE:

September 20, 2017

NO LATER THAN 3:00 PM PACIFIC TIME

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# 1.0 Executive Summary

This section should be a two to three page summary of the key aspects of Proposer’s response to this Request for Proposal (RFP).

### Proposer Information

Company name: Address: Phone:

Fax:

Federal Tax Id:

Representative Name: Title:

Address: Phone: E-mail:

### Overview of Proposed Solution

#### Response:

### Approach to Meet Project Purpose

#### Response:

### Overview of Proposer Qualifications

#### Response:

# 2.0 Organization Overview and Qualifications

In the following sections Proposer must provide all information requested regarding Proposer’s unique capabilities as an Information Technology (IT) Vendor.

### Proposer’s Company Overview

### Table 1. Company Overview

|  |  |
| --- | --- |
|  | **Information** |
| **Company name** |  |
| **RFP Response lead/account executive name,**  **title and contact information:** |  |
| **Industry (NAICS)** *(North American Industry*  *Classification System)* |  |
| **Fiscal 2016 company revenue** |  |
| **Fiscal 2016 company net income** |  |
| **Headquarters Location** |  |
| **Date Founded** |  |
| **Company Ownership** *(i.e. private/public, joint venture)* |  |
| **Number of years Proposer has been providing**  **Software Development, Implementation and/or User Training services** |  |
| **Number of employees:**  **Total:**  **Implementation Services:** |  |
| **End of Table** | |

### References

Provide at least three references of customers with comparable service.

### Table 2. Reference 1

|  |  |
| --- | --- |
| **Reference # 1** | |
| **Customer Name** |  |
| **Industry** |  |
| **Contact Name and Title** |  |
| **Address** |  |
| **Telephone** |  |
| **Vendor’s Project Manager Name** |  |
| **Describe project or service. Please provide Internet links to either the** **service or to the organization that uses the service.** |  |
|  |  |

### Table 3. Reference 2

|  |  |
| --- | --- |
| **Reference # 2** | |
| **Customer Name** |  |
| **Industry** |  |
| **Contact Name and Title** |  |
| **Address** |  |
| **Telephone** |  |
| **Vendor’s Project Manager Name** |  |
| **Describe project or service. Please provide Internet links to either the** **service or to the organization that uses the service.** |  |
| **End of Table** | |

### Table 4. Reference 3

|  |  |
| --- | --- |
| **Reference # 3** | |
| **Customer Name** |  |
| **Industry** |  |
| **Contact Name and Title** |  |
| **Address** |  |
| **Telephone** |  |
| **Vendor’s Project Manager Name** |  |
| **Describe project or service. Please provide Internet links to either the** **service or to the organization that uses the service.** |  |
| **End of Table** |  |
|  |  |
|  |  |

### 2.3. Experience

Describe your organization’s experience on similar assignments. This could include projects that involve courts or other public agencies, digital services or ability-to-pay determinations.

#### Response:

### 2.4 Qualifications of Key Staff

Provide names of key staff who will be assigned to this project and their resumes.

#### Response:

### 2.5 Roles and Functions

Affirm the roles and responsibilities listed in the RFP, providing recommendations for any additional roles and responsibilities not included.

### 2.6 Organization Chart

Provide an organizational chart that clearly identifies the vendor team and roles that will support the solution. Include the names of Proposer’s key employees and staff positions.

# 3.0 Project Management Plan

### Project Management and Best Practices

Describe the proposed methodologies and industry best practices that will be used to carry project from requirements through to finished deliverables, including, but not limited to, software development, deployment, training and transfer of knowledge.

#### Response:

### Quality Management

Describe Proposer’s proposed quality assurance and testing practices. This should include reference to the use of any specific methodologies.

#### Response:

### Project and Team Communications

Describe how the Proposer’s approach to working with Judicial Council staff and cross functional team in regular communications and in preparation for meetings, trainings and presentations.

#### Response:

# 4.0 Product Offering Response

## ATP Tool Requirements

* + 1. Summarize your approach for your solution to meet the RFP’s requirements as listed in *Attachment 8.*

#### Response:

### Implementation

* + 1. Describe your planned approach to implementing and deploying your ATP Tool to the five pilot courts.

#### Response:

* + 1. Given the timeline and maximum $150,000 in funding available for the services outlined in this RFP, describe the time you estimate is required to achieve the goals of this RFP and the described project phases, both in hours and in duration.

***Response:***

### Scalability

* + 1. Describe how your ATP Tool’s ability to expand will meet needs of multiple courts across jurisdictions. Describe the tool’s potential to expand in use statewide.

#### Response:

### Training and On-Going Maintenance

* + 1. Describe your end user training and user documentation.

#### Response:

* + 1. Describe your Help Desk services and problem resolution processes in place after initial deployment.

#### Response:

## Software Architecture

* + 1. Describe your software architecture and its components, including diagrams and documentation.

#### Response:

## Security

* + 1. Describe your authentication process.

#### Response:

* + 1. Describe your access control process.

#### Response:

* + 1. Describe your internet-based access process.

#### Response:

* + 1. Describe your security logging process.

#### Response:

* + 1. Describe your encryption protocols and standards.

#### Response:

* + 1. Describe your process for encryption of sensitive and confidential exchange.

#### Response:

## Administration

* + 1. Describe your tools for system administration; include system in operation versus system down-time.

#### Response:

* + 1. Describe logging features.

#### Response:

# 5.0 Requirements Response

*Instructions:* For each requirement, provide commentary in the Response column of *Attachment 8* that describes your ability to support or not support the requirement. Additional comments may be entered in the comments column in *Attachment 8* and/or below.

**Check** - Proposer has fully responded to *Attachment 8 Requirements.*

# 6.0 Vendor Cost Proposal

Note: This Section 6.0 must be provided only in a single sealed envelope, separate from the non-cost portion of the Proposal response.

### 6.1 ATP Tool Development and Deployment

Provide a detailed pricing for your ATP Tool solution development, deployment to five pilot courts, end-user training, help desk services and knowledge transfer to JCC staff, per the deliverables outlined in the RFP, including the cost of any required licenses, services, and support for various court sizes and implementations.

#### Response:

# 7.0 Additional Information

## 7.1 Additional Options

**7.1.1** Describe any additional options to this proposal response, services and functionality that would accommodate the ATP Tool solution. If these Additional Options include pricing please provide all of the pricing for the Additional Options in the Cost Proposal Envelope only.

#### Response:

# 8.0 RFP Checklist

*To prevent disqualification, please ensure you have included or addressed all the items below in your response.*

Included Proposer Company’s Name, Address, Telephone, and Fax numbers, and Federal identification number

Included Proposer’s representative’s Name, Title, Address, telephone, and Email Address

Included California Seller’s permit or certification of registration

Included proof of good standing and qualification to conduct business in California

Included current business license, professional certification or other credentials

Attachment 3: Completed Attachment 3, Proposer’s Acceptance of Terms and Conditions contained in Attachment 3

Attachment 4: Completed Attachment 4, General Certifications

Attachment 5: Completed Attachment 5, Small Business Declaration ***only*** if you wish to claim the small business preference.

Attachment 6: Completed Attachment 6, Payee Data Record

Attachment 7: Completed Attachment 7, Unruh and FEHA Certifications

Attachment 8: Completed Attachment 8, Project Requirements, Functional Requirements and Non-Functional Requirements, according to the instructions listed in Attachment 8.

Attachment 9: Completed Attachment 9, RFP Response Template

Executive Summary Organization Overview

Project Management Plan

Product Offering Response

Requirements Response

Vendor Cost Proposal

Additional Informational

RFP Checklist