Request for Quote (RFQ)
Information Technology Department Review

The Clerks of Court Operations Corporation ("CCOC") is a legislatively created corporate entity, created under Section 28.35, Florida Statutes. Its mission is to review and recommend budgets for court-related duties of the 67 Clerks of Circuit Court and to encourage Clerk's best practices using performance standards. CCOC office is headquartered in Tallahassee. Its web page is www.flccoc.org.

The CCOC needs certain services as more fully described below. This RFQ is intended to secure one or more qualified and affordable contractors to provide potentially all, part or none of such services.

This is an RFQ to select service providers to meet the service needs of CCOC. This RFQ consist of this transmittal only, and contains the instructions for the preparation of quotes, costs breakdown, minority business enterprise inquiry, and timeframe. Costs breakdown in any quote shall include an hourly rate for each employee, inclusive of all direct costs, for services provided in Leon County, Florida. Any quote should also include the qualifications to be required of each person designated to perform billable services.

Notice if Intent to Bid (Attachment 1) must be received by February 9th, 2018. The notice shall be sent by email to mbaker@flccoc.org.

Submission of the quote is due by February 26th, 2018. Direction for submission are included in the Request for Quote.

1.0 INTENT

1.1 Respondents are to submit a written quote that presents the respondent's qualifications, understanding of work to be performed, and description of fees. The respondent's quote should be prepared simply and economically and should provide all the information pertinent to its qualifications that respond to the Scope of Services listed herein.

1.2 Point of Contact: CCOC requires that respondents restrict all contact and questions regarding this RFQ to the individual named below. Questions concerning terms and conditions and technical specifications shall be directed in writing to:

<div align="center">

John Dew, Executive Director, Florida CCOC
2560-102 Barrington Circle
Tallahassee, Florida 32308
Mbaker@flccoc.org

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2.0 Scope of Services

2.1 Review / Assessment of CCOC's "IT" department. The goal would be to assist CCOC management with recommending, acquiring or outsourcing IT staffing services in the event of staff turnover or unforeseen unavailability of IT resources. The result of this review would identify the risks in the current IT business processes and technical resources, along with recommendations to mitigate those risks. CCOC's "IT" department is currently staffed by the Technical Resources Director and one part-time intern. CCOC currently uses Microsoft SBS 2012 in a VMware environment, Veaam Backup, Office 365, Microsoft SQL server in a cloud environment, cloud based web hosting and other PC based applications. The routine duties such as PC installation, troubleshooting hardware issues, software installation support and break / fix tasks and help desk are contracted to a third-party vendor.

2.1 Deliverables:
>   Develop a series of reference document(s) that lists an inventory of all vital internal and external technical assets, their purpose in the organization, and how to access them including any security credentials. These documents would be editable and would be maintained by the CCOC IT staff to reflect changes over time.
>   a.   List of internal assets – hardware, software and paragraph about their function within CCOC
>   b.   List of external assets – hardware, software and paragraph about their function within CCOC
>   c.   List of security credentials and how to access them. This data will be put into LastPass to be used within CCOC.
>   d.   Document that identify the risks in the current IT business processes and technical resources
>   e.   Suggest improvements to the IT process that will mitigate the risks described in d. above.
>   f.   Identify IT processes that may be more effectively managed by a third-party "IT" vendor.

2.2 Business Systems Analysis of PABS

2.2.1 Develop business process documentation for PABS that includes process flow charts for receiving, storing, and reporting on all budgetary data. This would include all back end and front-end systems, processes, identification of data dictionaries, and data stores. Include workflow diagrams for processes that identify all manual and automated steps up to the detailed technical routine (including SQL Queries, macros and batch jobs. The process starts from initial request for budgets / budget revisions and ends with issuing approved or revised budgets. In addition, there are other monthly monitoring reports for expenditures, revenues, and performance reports. Provide description(s) of each step in the workflow diagrams. The technical processes details for SQL Queries, macros and batch jobs shall be identified with a title in the flow diagrams, the details of what when and how are required in section 2.2.2. If a process block references a specific input

or output form or screen in the system, screenshots of the forms should also be included. The swim lane diagrams will identify external / internal department(s) or personnel responsible for the steps in the process. All workflow diagrams / process flow charts will be furnished in a cloud based or standalone software package that can be updated by CCOC staff once completed. One of the two mapping packages will be used. They are identified as Lucid Chart (https://www.lucidchart.com) or Smart Draw (https://www.smartdraw.com). For Process level definitions and diagrams refer to attachment 3 Process Level Definitions.

2.2.1 Deliverables:

Develop a series of Level 1 and level 2 flow charts that depict the PABS system in its current state.
   a. Develop the list of stakeholders and personnel that are involved in the process.
   b. Complete necessary Level 1 and Level 2 process flow and swim lane diagrams to describe the process.
   c. Review, validate, and correct the charts that are developed as part of 2.2.1 with CCOC personnel prior to 2.2.2 deliverables.

2.2.2 Develop a detailed system analysis of the PABS process of collecting over a two dozen reports from each of the 67 counties, transforming and uploading the data into the current data warehouse (SQL Server), and then aggregating, shaping, and disseminating the data to end-users.
   This analysis would include:
   1) Decompose / reverse engineer the current mapping of each report to the back-end data warehouse.
   2) Provide the business meaning of each data element.
   3) Identifying all validations and business process workflow operations (including forecasting) related to each data element.
   4) Provide a process description and technical details for each automated process including for SQL Queries, macros and batch jobs within the PABS application and any spreadsheets used as input. Include routines currently used to manipulate and load the data for each report into the data warehouse.
   5) Provide a detail process description for each current Excel file used to pull data subsets from the read-only partial replication of the data warehouse.
   6) Provide other manual or administrative tasks related to the coordination and execution of these processes.
   7) Identify business processes within PABS that may be more effectively managed by third-party "IT" vendor.
   8) Identifying requirements for building a new PABS system that is dynamic, configurable, and resilient to change with process change recommendations.

2.2.2 Deliverables:

Develop a series of Level 3 and 4 flow charts that depict the PABS system in its current state. In addition to the flow charts, include the detail data dictionary, SQL database and

table structure and other technical details to describe the current state of the PABS system.

   a. Complete necessary Level 3 and Level 4 process flow and swim lane diagrams to describe the detail technical processes.
   b. Provide a PABS data dictionary, SQL data tables, and table relationships.
   c. Document SQL Queries, macros and batch jobs
   d. Document All Excel files, Excel templates, macros or other programming used in the spreadsheet process
   e. Specifically identify manual or administrative tasks related to the coordination and execution of the PABS processes. Recommend automation of these processes where possible
   f. As an outcome of this analysis, identify any areas that might require detail business process reengineering including areas for updates to the current state of CCOC's PABS.

3.0 Services

3.1 There will be no guarantee of a minimum level of service to be acquired by CCOC.

3.2 The Corporation shall not be charged for research time or time spent waiting for scans, software loads, etc. The Corporation shall only be charged for active time working towards a resolution. It is understood that this is a government rate provided to the vendor and as such, the Corporation shall provide tax exemption and other necessary documentation for vendor records.

3.3 This is a one-year contract. CCOC maintains the option to renew this contract for each of the two subsequent years (on a year-to-year basis) at the discretion of the CCOC and agreement with the vendor.

4.0 Requirements to be provided

4.1 The Notice of Intent to Bid, is nonbinding; however, it ensures the receipt of all addenda related this RFQ. Quotes will be accepted only from applicants who submitted a timely Notice of Intent to Bid. (See Attachment 1)

4.2 Format and number of copies to be submitted: One (1) electronic copy of each quote must be submitted via CD, USB thumb drive or Dropbox or by e-mail (only if under 10 MB).

4.3 Quote shall be signed by the person authorized by the respondent as the primary representative or officer.

4.4 Respondents shall include as part of their quote responses to the following information at a minimum:

   4.4.1 Name, address, telephone number, etc. of the firm or person submitting the quote;
   4.4.2 Qualifications, certifications, and education professional resume of all persons that would provide services under any resulting contract;
   4.4.3 A straightforward, concise description of capabilities to satisfy the requirements of the RFQ;
   4.4.4 References;
   4.4.5 Fee schedule and rates, the cost to CCOC for the services offered (attachment 1); and

4.4.6 A written description of any (i) litigation during the past (5) yeas involving the respondent or any person listed in the response relating to professional services, including a summary of the disposition of such matter or matters; and (ii) a list of any grievances filed within the past five (5) years against respondent or any person listed in the response with any regulatory or judicial body, including a summary of the disposition of such matter or matters.

5.0 Reference
All respondents shall include a list of a minimum of three (3) references, for similar services only, who could attest to the respondent's knowledge, quality of work, timeliness, diligence, and flexibility. Include names, contact persons, and phone numbers of all references.

6.0 Evaluation Methodology
The CCOC will evaluate proposals from responsive vendors who have utilized the criteria below in 7.0 Evaluation Criteria. Evaluations will be conducted by an evaluation team. Scoring will be based on a possible 100 points. The CCOC may invite one or more of the most highly qualified respondents to attend a formal interview.

7.0 Evaluation Criteria
These criteria are to be utilized in the evaluation of the Quotes of those respondents to be considered. Respondents are required to address each evaluation criteria in the order listed and to be specific in presenting their qualifications.

7.1 Flexibility/understanding of requirements --- (20 points) The degree to which the respondent has answered the purpose and scope e.g. services to be provided--- flexibility of respondent to meet the CCOC needs, conformance in all materials respect to this RFQ, etc.

7.2 Capability --- (20 points) The respondent that has the capability in all respects to perform fully the contract requirements and the moral and business integrity and reliability that will assure good faith performance as required by these specifications. Also includes respondent's capability and skill to provide the products or perform the services stated in these specifications.

7.3 Experience--- (25 points) The respondent's experience in providing the services as requested in these specifications.

7.4 Cost--- (35 points) The costs of the services to the CCOC.

8.0 Communication during evaluation
Under no circumstances shall any respondent contact in person, by telephone, or otherwise any representative of the CCOC other than as provided above. Failure to comply with this provision may result in the disqualification of that entity from this procurement process.

9.0 Contract
9.1 The successful vendor will be required to enter into a contract with the CCOC. Any contract shall be in accordance with the contract format required by the CCOC.

9.2 The contract shall be for a primary term of one (1) year with the option to renew for two (2) additional one (1) year terms, if both parties agree.

9.3 The contract will be monitored for acceptable services rendered throughout the contract period.

9.4 The CCOC shall have the right to cancel and terminate any contract(s), in part or in whole for any reason or for no reason, without penalty upon notice to the contractor. Contractor shall not be entitled to lost profits or any further compensation not earned prior to the time of cancellation.

Calendar of Events		
Tasks	*Date*	*Time*
CCOC Release of RFQ	1/29/2018	5:00 PM (EST)
Letter of Intent to Bid sent electronically	1/29/2018	5:00 PM (EST)
Deadline for submission of Letter of Intent to Bid	2/9/2018	5:00 PM (EST)
Deadline to ask additional questions	2/12/2018	5:00 PM (EST)
Addenda released if necessary to answer questions	2/19/2018	5:00 PM (EST)
RFQ quote due	2/26/2018	5:00 PM (EST)
Award date	3/19/2018	5:00 PM (EST)

Attachment 1
Letter of Intent to Bid
(Due February 9, 2018)

Mr. John Dew
Executive Director
Florida Clerks of Operations Corporation
2560 Barrington Circle
Tallahassee, Florida 32308
mbaker@flccoc.org

Reference: RFQ for Technology Department Review

This is to notify you that it is our present intent to (submit/not submit) a quote in response to the above referenced Request for Quote. The individual to whom information regarding this RFQ should be transmitted is:

> Name: _____
> Company: _____
> Address: _____
> Phone Number: _____
> Fax Number: _____
> E-mail address: _____

Sincerely,

_____   _____
Name (Signature)   Date

_____
Type Name & Title of Representative

_____
Type Name of Company _____

Attachment 2
Fee Schedule and Rate

Vendor will provide hourly rate for the services outlined in this RFQ for "IT" Department Review

Technical Asset Reference Document

Service Description/Staff	Hourly Rate
Total Estimated Hours	

Business Process Document

Service Description/Staff	Hourly Rate
Total Estimated Hours	

Detailed Business Process Analysis

Service Description/Staff	Hourly Rate
Total Estimated Hours	

Process Level Definitions/Types of Diagrams

Process Modelling levels:

Level one: this very high-level map outlines the operational levels of an Organization. Examples include:

Customer processes, administrative processes.

Level two: shows end-to-end processes across the above operational areas.

For example, a level two process for purchasing capital equipment would cross several operational areas: the requesting department, purchasing, accounts payable, asset management, receiving and maintenance. These diagrams are also called top down or high-level process maps. They are quick and easy to draw, but may not provide the detail necessary to build understanding or realize improvements.

Level three: shows the roles, inputs, outputs and steps required to complete a specific process within an operational area, for example, the purchasing process.

Level four: is the documentation of systems, instructions and procedures required to complete steps in the level three processes and shows inputs, outputs, associated steps and decision points. For example, specific steps necessary to cut a PO in the enterprise application would require a level four process map. The procedures and system instructions can be represented as text, an algorithm or detailed process map. Because of the level of detail, they can be resource-intensive to create, but offer the greatest improvement potential. Since they illustrate decisions and subsequent actions, they are excellent training and reference materials

Process Diagram Methodology Examples

The Linear Flow Map is the most traditional and is usually where most start the mapping effort.

The Swim Lane Map adds another dimension of knowledge to the picture of the process: It shows which department area or person is responsible. You can use the various types of maps in the form of any of the levels of a Process Map.