

JD Peacock, II
OKALOOSA COUNTY
EXECUTIVE COUNCIL CHAIR

Jeffrey R. Smith, CPA, CGMA
INDIAN RIVER COUNTY
VICE-CHAIR

Tiffany Moore Russell, Esq.
ORANGE COUNTY
SECRETARY/TREASURER



STACY BUTTERFIELD, CPA
POLK COUNTY

JOHN CRAWFORD
NASSAU COUNTY

TODD NEWTON
GILCHRIST COUNTY

LAURA E. ROTH
VOLUSIA COUNTY

HARVEY RUVIN, ESQ.
MIAMI-DADE COUNTY

RON FICARROTTA
13TH JUDICIAL CIRCUIT JUDGE
SUPREME COURT APPOINTEE

NIKKI ALVAREZ-SOWLES, ESQ.
PASCO COUNTY
SENATE APPOINTEE

KEN BURKE, CPA
PINELLAS COUNTY
HOUSE APPOINTEE

JOHN DEW
EXECUTIVE DIRECTOR

FIRM OF BOYD AND DURANT
GENERAL COUNSEL

2560-102 BARRINGTON CIRCLE | TALLAHASSEE, FLORIDA 32308 | PHONE 850.386.2223 | FAX 850.386.2224 | WWW.FLCCOC.ORG

CCOC Request for Quote (RFQ) for Clerks and Staff Training and Education

The Clerks of Court Operations Corporation (“CCOC”) is a legislatively created corporate entity, as established under Section 28.35, Florida Statutes. Its mission is to review and recommend Florida Clerk of Courts Article V court-related budgets and to encourage Clerk’s best practices using performance standards. It is headquartered in Tallahassee and its web page is www.flccoc.org.

The CCOC needs certain services as more fully described below (hereinafter “Services”). 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 the CCOC. This RFQ consists of this transmittal only, and contains the instructions for the preparation of proposals, costs breakdown, and timeframe. Costs breakdown in this proposal shall be based on deliverables.

Notice of Intent to BID (Attachment 1) shall be sent by email to John Dew at jdew@flccoc.org by 5:00 p.m. (EST) November 15, 2021.

All question pertaining to this RFQ should be made via email to jdew@flccoc.org. Questions and answers will be posted on the CCOC website.

1.0 INTENT

- 1.1 Respondents are to submit a written proposal that presents the Respondent's qualifications, understanding of work to be performed, and description of costs. The Respondent's proposal 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:** The 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 to:

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

2.0 SCOPE OF SERVICES

Subsection 28.35 (2) (f), F.S. requires the Corporation to develop and conduct clerk education programs. The Annual Training Program for clerk education will be developed and conducted in conjunction with the CCOC Executive Committee and staff.

- 2.1 **Deliverable: AN ANNUAL TRAINING PROGRAM:** Plan and develop an annual comprehensive training program and curriculum in conjunction with CCOC staff input and approval.
- 2.2 **Deliverable(s): NEW CLERK ACADEMY:** Plan and new Clerk Academy Program Certification and curriculum schedule, planning, and program, pursuant to Clerk of Court certification requirements and directed by Section 145.051, F.S., and implemented by Florida Supreme Court Administrative Order dated November 18, 1996 in conjunction with CCOC staff and approval. Accommodations should be made for up to two (2) CCOC staff members to attend New Clerk Academy sessions. When CCOC staff are speaking at New Clerk Academy programs, accommodations should be provided for these speakers as well.

Structured to focus on the following eight functional areas:

- 2.2.1 General orientation / office transition
 - 2.2.2 Administration and office management
 - 2.2.3 Court services and operations
 - 2.2.4 Records maintenance and management
 - 2.2.5 Financial administration and management
-

- 2.2.6 Office technology and resources
 - 2.2.7 State and county government organization, structure, and relationships
 - 2.2.8 Personal skills development

 - 2.3 **Deliverable(s) CONFERENCE(s):** Plan and develop all logistical and training program components for conferences including planning report, program activity and curriculum reports in conjunction with CCOC staff. The CCOC will determine the date and time of the Executive Council Meeting that precedes each conference. Registration and accommodations will be provided for up to four (4) CCOC staff members for all conferences.

 - 2.4 **Deliverable(s) PLANNING & DEVELOPMENT FOR SPECIAL WORKSHOPS:** Plan and develop all logistical and training program components of special workshops deemed necessary and/or delineated in annual training program for the contract year in conjunction with and approval by CCOC staff. The workshops will focus on specific subject matters that may be identified to best be addressed through special or regional workshops. The educator should also develop a plan to provide workshops on-line or by use of “webinars” as a means of limiting costs. Registration and accommodations will be provided for up to four (4) CCOC staff members for all special workshops.

 - 2.5 **Deliverable(s) PLANNING & DEVELOPMENT OF WEBINAR/ SEMINAR SERIES:** Plan and develop all logistical and training program components for the Webinar Series for the contract year. Registration and accommodations will be provided for up to four (4) CCOC staff members for all webinars.

 - 2.6 **Deliverable(s) Planning & Development of ONLINE SUPPORT FOR TRAINING:** Plan and develop on-line electronic event registration for each training activity pursuant to this agreement. Provide online support for meetings and training sessions held virtually.

 - 2.7 **PROVIDE NOTIFICATION OF FUNDING BY THE CCOC:** Contractor shall assure that all education sessions and materials are accredited to the CCOC as the funding source such as, meeting and conference advertisements/ notices, website, placards, and other similar materials. This information will be clearly visible on all announcements, electronic information, printed materials, etc.

 - 2.8 **PROVIDE ACCESS TO MATERIALS AND RECORDINGS:** Any recordings or copies of presentation materials as part of conferences, webinars, seminars, or other educational sessions as outlined in the agreement should be available to CCOC staff.
-

2.9 PROVIDE SUPPORT TO CCOC FOR WEBEX DURING MEETINGS: Any meetings of the CCOC or their Committees will be given support by the vendor by setting up and managing the WebEx during such meetings. All meetings shall be recorded and such recording shall be provided to the CCOC staff.

3.0 SERVICES

- 3.1** Subcontracting of work under this RFQ/contract is not allowed.
- 3.2** There will be no guarantee of a minimum level of services to be acquired by the CCOC.
- 3.3** This is a one-year contract. The 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 of the vendor.

4.0 MINIMUM QUALIFICATIONS

- 4.1** Engaged in the practice of developing and providing training and education programs for at least the past five (5) years. Previous work experience with the CCOC is helpful but not necessary for this RFQ.

5.0 INFORMATION TO BE PROVIDED IN PROPOSAL

- 5.1 FORMAT AND NUMBER OF COPIES TO BE SUBMITTED:** In order to be considered for selection, Respondent must submit a complete response to this RFQ. One (1) electronic copy must be submitted via USB thumb drive, Dropbox or e-mail (only if under 10 MB).
- 5.2** The quote shall be signed by the person authorized by the primary representative or officer.
- 5.3** Respondents shall include as part of their proposal responses to the following information at a minimum:
 - 5.3.1** Name, address, telephone number, etc. of the firm or person submitting the proposal;
 - 5.3.2** Qualifications, certifications, and educational professional resume of all persons that would provide services under any resulting contract;

5.3.3 A straightforward, concise description of capabilities to satisfy the requirements of the RFQ;

5.3.4 References - 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.

5.3.5 Cost schedule – (Attachment 2); and

5.3.6 A written description of any (i) litigation during the past five (5) years 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.

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 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 – The degree to which the Respondent has responded to the purpose and scope of specifications – e.g., services to be provided – the flexibility of Respondent to meet the CCOC needs, and conformance in all material respects to this RFQ, etc.

7.2 Capability – The Respondents that have 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 – Respondent’s experience in providing the services as requested in these specifications.

7.4 Cost – The Cost 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 in Section 1.2 regarding this RFQ. 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 Contractor(s) 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 Contract Term – This 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 are in agreement.

9.3 The contract will be monitored for acceptable services rendered throughout the contract period and may require invoices and other documentation to support costs upon request.

9.4 Cancellation of Contract – 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		
Task	Date	Time
CCOC Release of RFQ	11/03/2021	5:00 PM EST
Letter of Intent to Bid Sent electronically	11/15/2021	5:00 PM EST
Deadline to protest RFQ specifications and Ask Questions	11/15/2021	5:00 PM EST
Addenda Released if Necessary to Answer Questions	11/18/2021	5:00 PM EST
RFQ Proposal Due	11/23/2021	5:00 PM EST
Executive Council Meeting	12/16/2021	9:00 AM EST
Contract Start Date	1/01/2022	9:00 AM EST

**ATTACHMENT 1
LETTER OF INTENT TO QUOTE**

Mr. John Dew
Executive Director
Florida Clerk of Court Operations Corporation
2560 Barrington Circle
Tallahassee, FL 32308
jdew@flccoc.org

REFERENCE: RFQ for Clerk and Staff Training and Education

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: _____
City, State & Zip: _____
Phone Number: _____
E-mail Address: _____

I/We concur with the proposed language as presented in the RFQ.

Sincerely,

Name(Signature)

Date

Typed Name & Title of Representative

Typed Name of Company

**ATTACHMENT 2
Deliverable Schedule and Costs**

Provide the combined costs for each report pertaining to the deliverables outlined in this RFQ for Clerk and Staff Training & Education Services.

Deliverable/costs

Deliverable Description	# of Events	Total Cost
Annual Training Program Plan		
New Clerk Academy 1. Curriculum Report 2. Program Activity Report 3. Planning Report 4. Online Support Report		Reports 1. 2. 3. 4.
Conferences 1. Curriculum Report 2. Program Activity Report 3. Planning Report 4. Online Support Report		Reports 1. 2. 3. 4.
Workshops 1. Curriculum Report 2. Program Activity Report 3. Planning Report 4. Online Support Report		Reports 1. 2. 3. 4.
Webinars 1. Curriculum Report 2. Program Activity Report 3. Planning Report 4. Online Support Report		Reports 1. 2. 3. 4.
Other if applicable		
Total Costs		\$