

Honorable Howard Forman
Broward County
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Honorable Harvey Ruvin
Dade County
Vice Chairman

Honorable Richard Weiss
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Secretary/Treasurer

Honorable John Crawford
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Brevard County

Honorable Bob Inzer
Leon County

Honorable Buddy Irby
Alachua County

Honorable Tim Sanders
Madison County

**Honorable
Margaret Steinbeck**
Judge

Senate

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House

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Joe Boyd
General Counsel

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Executive Director

2560-102 Barrington Circle
Tallahassee, Florida 32308

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Phone: 850.386.2223
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November 24, 2009

To: Prospective Contractor

Subject: CCOC Request for Proposals (RFP) for Budget Services

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 Florida Clerk of Courts Article V court-related budgets and to encourage Clerk's best practices by the use of performance standards. Its headquarters is in Tallahassee and its web page is www.flccoc.org.

The CCOC is in need of certain services as more fully described below (hereinafter "Services"). This RFP is intended to secure one or more qualified and affordable contractors to provide potentially all, part or none of such services.

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

A bidders' conference will be held at the CCOC General Counsel's office at 1407 Piedmont Drive E, Tallahassee, Florida 32308 at noon on December 9, 2009, for the purpose of answering any questions. Attendance may be by telephone or in person. Instructions for attendance by telephone will be posted on the CCOC website by noon on December 7, 2009. Attendance at the bidders' conference is not required.

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 fees. 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: CCOC requires that Respondents restrict all contact and questions regarding this RFP to the individual named below. Questions concerning terms and conditions and technical specifications shall be directed by email to:

rfpbudget@flccoc.org

2.0 SCOPE OF SERVICES

2.1 Stakeholder Coordination and Support:

In setting budget policies and procedures, receiving and reviewing and approving and monitoring Article V budgets, the CCOC coordinates with multiple stakeholders (e.g. individual Clerks, the FACC, the Legislature, the Governor's Office, the Florida Department of Financial Services, Supreme Court, and the Florida Department of Revenue). Budget systems design and development must be done by the most qualified people to maximize utility and efficiency for Clerks and help assure credibility in the process.

2.2 Information Technology & Budget Systems Design and Development Support

CCOC is continuing to seek methods to more easily receive, store, and analyze budget data. We will seek help in continuing to create systems that will display budget related information.

2.3 Performance Measurement Systems Development and Use

CCOC has developed a system to capture data from Clerks on their performance against standards adopted by the CCOC. A contractor will help the CCOC staff review the current system and determine where the system could be improved and help assure the system meets the requirements of law and expectations of the State.

2.4 Budget Preparation, Analysis and Implementation

CCOC currently has a budget process in place. A contractor will help CCOC staff review the current system for improvements, review whether the current system has limitations that may be detrimental to the Clerks and/or the State, and review the system to assure it meets the needs of the Clerks and the State.

2.5 Unit Costs Budgeting and Efficiency Analysis

The CCOC is required to compare each Clerk's budget expenditures and unit costs for core services as specified in law with a peer group of Clerk offices having a population of a similar size and a similar number of case filings. A contractor will assist CCOC staff with continuing to review the development of a peer grouping methodology and a system for comparing Clerk offices using unit costs in the CCOC budgeting process. The CCOC will also utilize unit costing by services, court entities, and case types to isolate and respond to opportunities for efficiency improvements. Knowledge of Clerk offices court-related programs, services, activities, and tasks would greatly assist in developing peer groups and unit cost methodologies.

2.6 Long Range Program Planning (LRPP)

CCOC is required by law to prepare a legislative budget request for the resources necessary to perform its duties, submit the request pursuant to Chapter 216, F.S. and be funded as a budget entity in the General Appropriation Act. A contractor will assist the CCOC staff with continuing to review its Long Range Program Plan as required in law and connect the LRPP to the CCOC legislative budget request.

3.0 SERVICES

- 3.1 Services shall be provided at CCOC headquarters unless directed otherwise by the Executive Director of CCOC.
- 3.2 Subcontracting of work is not allowed.
- 3.3 There will be no guarantee of a minimum level of services to be acquired by CCOC.

4.0 INFORMATION TO BE PROVIDED IN PROPOSAL

- 4.1 **FORMAT AND NUMBER OF COPIES TO BE SUBMITTED:** In order to be considered for selection, Respondent must submit a complete response to this RFP. One (1) original and three (3) copies of each proposal must be submitted. In addition, one (1) electronic copy of each proposal must be submitted, via CD or USB flash drive.
- 4.2 Proposal shall be signed by the person authorized by the Respondent as the primary representative or officer.
- 4.3 Respondents shall include as part of their proposal responses to the following information at a minimum:
 - 4.3.1 Name, address, telephone number, etc. of the firm or person submitting the proposal;
 - 4.3.2 Qualifications, certifications, and educational professional resume of all persons that would provide services under any resulting contract;
 - 4.3.3 A straightforward, concise description of capabilities to satisfy the requirements of the RFP;
 - 4.3.4 References;
 - 4.3.5 Fee schedule and rates – the cost to CCOC for the services offered. The fee schedule should be included in a separate, sealed envelope and labeled accordingly.
 - 4.3.6 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.

5.0 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.

6.0 EVALUATION OF PROPOSALS

The CCOC will evaluate the proposals. The CCOC may invite one or more of the most highly qualified Respondents to attend a formal interview. The interview will allow the invited Respondents to further discuss their qualifications with the CCOC, and to respond to questions from the CCOC.

7.0 EVALUATION CRITERIA

These criteria are to be utilized in the evaluation of the Proposals 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 – flexibility of Respondent to meet the CCOC needs, conformance in all material respects to this RFP, 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 in regard to this RFP. 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 Respondent(s) will be required to enter into a contract with the CCOC. Any contract shall be in accordance with the contract format required by 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.
- 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.

10.0 RESPONSE DUE DATE

- 10.1 In order for a Respondent to be considered, all forms must be received at 2560-102 Barrington Circle, Tallahassee, Florida 32308 by no later than 4:00 p.m. Wednesday, December 23, 2009. Forms may be delivered by hand, US Postal Service, FedEx or other hard copy delivery method.