City and County of San Francisco
Juvenile Probation Department

City and County of San
Francisco
Juvenile Probation
Department

REQUEST FOR PROPOSALS FOR *Web-Based Case Management System*
RFP# 121102
CONTACT: Sheila Layton, Sheila.Layton@Sfgov.org, 415-753-7562

Intent of this RFP
It is the intent of the Juvenile Probation Department to identify the most responsive and qualified Proposer(s) to negotiate a contract to provide a Web-Based Case Management System. This service will allow Juvenile Probation Officers and other staff to assess and monitor youthful offenders. Proposers are not guaranteed a contract.

Anticipated Contract Budget
The anticipated contract budget is $235,000 over a 1 year contract term. The City seeks proposals demonstrating an efficient, effective approach with measurable program deliverables and outcomes.

Anticipated Contract Term
The initial contract period is anticipated to be one year, from approximately **5/13/13 to 5/12/14** with options for the City to extend the contract for two additional one-year terms. The actual contract period may vary, depending upon service and program needs, at the City's sole, absolute discretion. Contractor selected must be available to commence work on or before **5/13/13.**

Subcontracting Requirement
There is no Human Rights Commission Local Business Enterprise (LBE) subcontracting requirement for this RFP.

City-Proposer Communications
Questions about this RFP will be accepted from all Proposers. Please e-mail questions to Sheila Layton at Sheila.Layton@Sfgov.org before **12 p.m. on February 19th, 2013**.

No phone calls will be accepted. Proposers are specifically directed NOT to contact any other employees or officials of the City.

Questions and answers pertaining to this RFP will be posted by **5 p.m. on February 28th, 2013** on the Juvenile Probation Department website at: http://sfgov3.org/index.aspx?page=549 or http://mission.sfgov.org/ocabidpublication/.

Schedule*
RFP Issued:

2/5/2013

Deadline For Questions:

2/19/2013 (12 p.m. PT)

Response to Questions Posted:

2/28/2013 (5 p.m. PT)

Deadline For Proposals:

3/14/2013(12 p.m. PT)

Interviews:

4/9/2013 and 4/10/2013

Contract Award Intent Notification:

4/11/2013

Contract Begins:

5/13/2013

*Each date subject to change. Check website for latest schedule.

1. Introduction

A. SF Juvenile Probation Department Mission

It is the mission of the San Francisco Juvenile Probation Department to serve the needs of youth and families who are brought to our attention with care and compassion; to identify and respond to the individual risks and needs presented by each youth, to engage fiscally sound and culturally competent strategies that promote the best interests of the youth; to provide victims with opportunities for restoration; to identify and utilize the least restrictive interventions and placements that do not compromise public safety; to hold youth accountable for their actions while providing them with opportunities and assisting them to develop new skills and competencies; and to contribute to the overall quality of life for the citizens of San Francisco within the sound framework of public safety as outlined in the Welfare & Institutions Code.

B. Background of the Juvenile Probation Department

The San Francisco Juvenile Probation Department ("JPD") is responsible for investigation, supervision and detention of youth, ages 11–17, who have been referred to JPD. JPD serves youth through three types of programs:

1. Juvenile Hall: a short term detention center which holds youth who are taken into custody. Youth remain in Juvenile Hall until released by a Judge. Primary Judicial criteria for release are: lack of public safety risk and lack of flight risk.
2. Log Cabin Ranch (LCR): a long-term rehabilitative residential facility for boys as a post-adjudication disposition. LCR provides a wide range of intensive services for its residents, including an accredited school, vocation training and programs, enrichment activities, counseling, structured therapy and group-work sessions.
3. Probation Services: this area of JPD includes investigation into circumstances of youth who have been referred by law enforcement and also provides assessments and supervision of youth placed on probation by the courts.

Who JPD Serves: 2011

San Francisco Juvenile Probation closely analyzes key demographic characteristics of its youth using the best practice known as REGGO: (Race/Ethnicity, Geography, Gender, and Offense). The table below provides a summary of key demographic data points regarding the population served during 2011:

Duplicated Referrals	2,196
Unduplicated Referrals	1,419
Bookings into Juvenile Hall	1,146
Citations (not booked in JH)	845
Average length of stay in Juvenile Hall (Days)	27
Average Daily Population of Juvenile Hall	89
Average Daily Population of Log Cabin Ranch	22

Other important key demographics are based on gender, age, race and type of crimes committed. Youth demographics at JPD consisted of the following in 2011:

- 1,625 Males made up 74% of the population
- 571 Females made up 26% of the population
- 10% of the population were 10 to 13 years old
- 12% of the population were 14 year olds
- 19% of the population were 15 year olds
- 24% of the population were 16 year olds
- 31% of the population were 17 year olds
- 1% of the population were 18 year olds
- 1,147 African-Americans made up 52% of the population
- 587 Latinos made up 27% of the population
- 193 Asians made up 9% of the population
- 135 Caucasians made up 6% of the population
- 87 Pacific Islanders made up 4% of the population
- 47 Youth identified as Other made up 2% of the population
- 462 Youth (63%) committed a crime against a person
- 150 Youth (20%) committed a crime related to property
- 94 Youth (13%) committed a crime related to public order
- 30 Youth (4%) committed a crime related to drugs

C. Project Description

The San Francisco Juvenile Probation Department invites written proposals from qualified vendors to provide JPD with a Web-Based Case Management System that will enhance Juvenile Probation operations. The proposed system will provide a unified Case Management Information System that will effectively support the Department's day to day activities such as: supervising offenders pursuant to court order, providing quality information to the court, operating the Juvenile Detention Center and Log Cabin Ranch, creating case notes and tracking reports, and coordinating services and monitoring outcomes for youth. As youth move among the divisions of the Department, i.e., Juvenile Hall, Probation Services and Log Cabin Ranch, the Web-Based Case Management System will be used as a tool to provide a unified continuum of care, allowing staff from all divisions to document their work in a single data system. Additionally, it will expand the range of data available to managers for critical decision making, quality assurance, and improvement of services.

Currently, JPD uses the following information systems: Juvenile Justice Information System (JJIS), Youth Assessment and Screening Instrument (YASI) and Child Welfare Services/Case Management System (CWS/CMS). JPD intends to integrate as much of these data as possible. Proposals shall address evaluation required to migrate/integrate existing data from current data management systems.   Data migration and web services requirements are included in this RFP. Proposals must specify any hardware that is needed to operate the proposed application software. We estimate our initial user group to be approximately 100 primary users and 150 secondary users. The proposed Web-Based Case Management System shall also have the ability to integrate with the Superior Court's information system. JPD also has access to other systems and may require that the Web-Based Case Management System interface with the following programs: Child and Adolescent Needs and Strengths (CANS Mental Health Assessment used by DPH), California Court Case Management System (CCMS), and the Department of Children, Youth and Their Families Contract Management System (DCYF CMS).

The San Francisco Juvenile Probation Department wishes to procure a proven off the shelf solution that can be customized, if needed, to meet JPD's functional and case processing requirements. Any proposed system should be one that has proven itself by operating successfully in a similar-sized Probation Department, preferably in California. The proposers chosen as finalists will each be required to provide an on-site in depth product demonstration at the San Francisco JPD offices as part of the final stage of the selection process.

2. Scope of Work

Management Requirements

The following scope of work outlines the expected deliverables and products to be provided. The respondent's proposal should describe the approach that will be used to accomplish the scope of work.

A. Project Plan for Implementation of Web-Based Case Management System

The vendor will develop a plan for implementing the vendor's proposed software solution. The plan shall be sufficiently comprehensive in scope and detail to convey the vendor's ability to manage this project. The demonstrated ability of the vendor to manage a project of this type will be one of the key factors in evaluating of the proposal. The plan shall include:

1. Project Management
   - The systems and processes for managing and scheduling project tasks, quality, and cost.
   - Identify the personnel and allocations to manage the project.

2. Project tasks and timeline
   - Tasks involved with successful implementation of vendor software.
   - A work plan schedule with time frames to complete each identified task.
   - Transition planning to assist with sustainability of the Web-Based Case Management System

3. Staffing Requirements
   - Staffing levels for each task and the type of personnel that will be devoted to this project.
   - A list of proposed project team members and resumes for each. Describe their proposed roles and responsibilities. The City reserves the right to reject any proposed team member. Describe personnel resources needed from San Francisco to implement this project.

4. Communications plan
   - Identification and communication of changes to any part of the project.
   - Status and progress of this project reported to JPD.

B. The below items represent some of the work tasks that will be expected during the project. Bidders should address each bulleted item below in their response. For more information about product performance elements, see section 2.D: Mandatory Functional Requirements.

1. Application Software

- Indicate the development language, version and any required framework versions used to develop the software solution application.
- Indicate the desk-top requirements needed to run the application software solution.

2. Coordination of Site Preparations
- Describe any site preparations that will be necessary for installation of hardware.
- Detail the required work space for vendor personnel.
- Describe any additional resources or requirements needed from JPD.

3. Implementation of Application
- Describe your firm's issue resolution procedures.
- Describe your strategy for testing implemented application software.
- Describe how your test plan, for both product functionality and usability, will work for quality assurance.
- Detail your strategy for "cutting over" or "going live" from existing data systems to the proposed Web-Based Case Management System.
- Describe how customization and integration will be planned and monitored to stay within agreed-upon budget.

4. System Training
San Francisco requires that the vendor provide comprehensive training for all users, administrative, technical and operational personnel. All initial training use of the software shall be done on-site at the San Francisco Probation Department and Detention Center. All training shall include step-by step detail that will enable San Francisco staff to perform all system functions.   Describe how the vendor will provide all aspects of training, including, but not limited to, the following:
- Initial software implementation.
- Customized modules.
- Future releases and upgrades of proposed software product.
- A train the trainer strategy.

C. Other Items to address in response

1. Financial Responsibility – Provide certification vendor financial status is stable.

2. References - List three (3) similar projects completed by your firm within the past five years. Provide contact information for a key reference from each agency.

D. Mandatory Functional Requirements
All of these system functions should work as a single system with a consistent look and feel so users do not perform the same function several times and/or enter the same data more than once. The functions defined by the requirements should interact with all other functions with minimal or preferably no manual intervention except when the user executes an override.

Please complete the RFP response **within** this document using the instructions provided below. The purpose of this section is to determine the capability of a vendor's product to provide the required functionality for the Web-Based Case Management System. Each vendor should

indicate whether its product supports this function and describe how the software performs the process and functional requirements.

Instructions for Mandatory Requirements Responses
Indicate the status of the functional requirement in the proposed Web-Based Case Management System. Valid Response Codes:
P **pass**, the functionality exists in the vendor's proposed software solution.
F **fail**, the functionality is NOT incorporated in vendor's proposed software solution.
V **varies**: the functionality in the vendor's proposed software solution differs from the described functionality, but meets the underlying functional need. Please utilize an attachment with reference to the requirement number to fully describe the proposed functionality. Any such variances are subject to approval by JPD.

If there is no vendor response to a requirement, it will be the same as a response of Fail (F). Any deviation from the response codes will be considered at the discretion of JPD.

Mandatory Requirements

1. Technical Server Requirements		Vendor Status
		Pass/Fail/ Variance
1.1	Windows Server	
1.2	SQL Server 2008 R2	
1.3	SQL Reporting Services	
1.4	Microsoft .Net Framework 3.5 or 4.0	
1.5	Web-Based Application running on Internet Information Services (IIS)	
1.6	Application should support 150-250 Users	
1.7	Internet Explorer 8.0 or greater	
1.8	CMS application shall be an off-the-shelf system which, if required, can be modified and customized with minimal effort by the vendor to meet the City's requirements.	
1.9	San Francisco will require the vendor to enter into an application software source code escrow agreement.	
2. Technical Support Requirements		
2.1	24/7 Technical Support	
2.2	Identified process and protocols for supporting an interface.	
2.3	CMS must maintain an average response time of 3 seconds or less during peak user times.	
2.4	CMS shall be able to accomplish all data manipulations while still maintaining system response times.	
2.5	CMS must be able to be securely accessed via the web by staff.	
2.6	CMS shall be able to export and import XML based schemas.	
3. General and Administration		
3.1	Role based user security	
3.2	Configuration of drop down values	
3.3	Audit trail	
3.4	Categorize data by department and facility	
3.5	Manage users and user access	
3.6	Manage access to available application features. Hide features that will not be used by the agency.	
3.7	Experience with data conversions by importing data from JJIS into the application	

3.8	The software application, if client server application, shall be deployed and updated from a central server(s).	
4. Search		
4.1	Search for person by basic demographic information and local identifiers	
4.2	Search for person by address or phone information	
4.3	Search for person by basic case information	
5. Intake		
5.1	Basic person demographic information	
5.2	Physical identifiers	
5.3	Multiple alias records	
5.4	Multiple address records (validate addresses)	
5.5	Multiple phone number records	
5.6	Gang information	
5.7	Scars and marks	
5.8	School and education information	
5.9	Multiple identifier records	
5.10	Multiple pictures/mug shots	
5.11	Face Sheet / Person Summary	
5.12	Family interview	
5.13	Multiple influential (parents) records	
5.14	Multiple family member records	
6. Case Management for Multiple Divisions **(Probation, Juvenile Justice Center, and Log Cabin Ranch)**		
6.1	Manage multiple case records	
6.2	Multiple note records	
6.3	Assign to a case manager	
6.4	Assign caseloads	
6.5	Transfer caseloads	
6.6	The user of "Officer of the Day" to handle absent officer caseloads	
6.7	Ability to associate cases with one another	
6.8	Ability to terminate a case	
6.9	Ability to add custom fields	
6.10	Contact Logs	
6.11	Placement tracking	
6.12	Court hearings	
6.13	Outcomes Tracking	
6.14	Victim and Restitution	
6.15	Court Petitions	
6.16	Court Dispositions	
6.17	Detention decisions and alternatives	
7. Assessments and Case Planning		
7.1	Title IV Case Planning	
7.2	CMS shall maintain the following data elements for each case plan: ❖ Offense pattern (narrative) ❖ Internal and External triggers (narrative) ❖ High Risk Areas (could be populated based upon assessment instrument and/or a drop-down menu of risk areas) • Motivation (narrative) • Targeted/Prioritized Risk Areas, with the following items: ▪ Long Term Goals ▪ Short-Term Goals, with target date and completion date. ▪ Barriers ▪ Strengths/Protective Factors ▪ Action Steps, with target date and completion date.	

7.3	Interface with a validated assessment program	
8. Supervision		
8.1	Referrals into programs	
8.2	Tracking of program participation	
8.3	Tracking of treatment	
8.4	Tracking of community service hours	
8.5	Probation conditions	
8.6	Tracking of supervision violations	
8.7	Tracking of rewards for complying with supervision conditions	
8.8	Tracking of supervision contacts	
8.9	Tracking level of supervision	
8.10	Ability to add custom fields	
8.11	Configurable contact standards. The system will notify Supervisors if standards are not being met on an individual.	
9. Scheduling and Calendaring		
9.1	Calendar of events	
9.2	Share calendars among users	
9.3	Reminder alerts of events sent to Probation Officers and Youth	
9.4	Text Message alerts of events sent to Youth and Guardians	
9.5	Configuration of alerts and alert priorities	
10. Workload Management		
10.1	Configuration of tasks and events when cases or person records are assigned to an officer	
10.2	Tracking of event completion	
10.3	Reminders and Alerts when tasks or events are scheduled to be due	
10.4	Notification of supervisors when officer tasks/events are not being completed	
10.5	Prioritization process based on supervision level	
10.6	Reports and alerts to supervisors when officers are at capacity	
10.7	Text and alerts to person and person influential on events	
11. Document and Forms Management		
11.1	Document storage of application forms	
11.2	Document storage of scanned and other external forms/files	
11.3	Form generation engine to configure forms and auto populate those forms from data within the system	
11.4	Manage forms from a central repository and on appropriate individual screens	
11.5	Electronic Signatures	
12. Detention Center Management		
12.1	Visitor Tracking	
12.2	Track approved list of visitors	
12.3	Detention Report	
12.4	Detention Intake	
12.5	Detention Screening and Reporting	
12.6	Incident/Misconduct Tracking and Disciplinary Actions	
12.7	Detention Property Management	
12.8	Housing conflicts	
12.9	Detention Shift and Master logs	
13. Mobile Access		
13.1	Case notes (from Section 8: Supervision)	
13.2	Contacts (from Section 5: Intake)	
13.3	Scheduled Events (from Section 9.1: Scheduling and Calendaring)	
14. Reporting		
14.1	Ad-Hoc reporting	

14.2	Incident reports	
14.3	Progress reports	
14.4	Social report	
14.5	Progress history report	
14.6	Quick charts	
14.7	241 Report	
15. Interface Basic		
15.1	Single Sign-On	
15.2	Active Directory	
15.3	Methodology for interface should be based on a web services solution	
15.4	Experience doing web service interfaces between multiple systems	
16. Interface CMS 2000		
16.1	Demographics	
16.2	Address	
16.3	Phone Numbers	
16.4	Contact	
16.5	Detention	
16.6	Detention Alternatives	
16.7	Disposition	
16.8	Identification Numbers	
16.9	Petitions	
16.10	Placement	
16.11	Referral	
16.12	Restitution	
16.13	Significant Other / Family	
16.14	Calendaring events from Court	
17. Documentation		
17.1	Documentation shall be provided that covers all system hardware, system software and application software	
17.2	Documentation must be provided in a least one of the following formats: ▪ Hard copy paper manuals ▪ CD ▪ Online	
17.3	Documentation will be provided with new releases/system upgrades.	
17.4	Documentation will be provided with any contracted customization.	
18. Security		
18.1	System Administrator maintained security module, able to add/inquire/delete users and set security parameters by: ▪ Functionality by user groups ▪ Module Function	
18.2	Login procedure with ID and password authentication.	
18.3	The system administrator shall have the ability to lock individual users out of system.	
18.4	CMS shall be able to be securely accessed via the web by staff, administration and officers.	
18.5	Security violations are logged	
18.6	Audit trails provided for all transaction detail: Audit trail consists at a minimum of user id, date and time stamp.	
18.7	All CMS electronic transmissions are secure as required by generally accepted security protocols.	
18.8	CMS shall prohibit users from bypassing fields where information is required to establish a correct/complete record.	

18.9	CMS has the ability to assign appropriate security to record types particularly those associated with pre-trial, juvenile and medical information. This security would allow only specific user types to view information related to indicated categories.	
18.10	CMS shall not display screens, functions or menus not authorized to the user.	

3. City-Proposer Communications

A. Question Submission
This RFP does not have a Human Rights Commission Local Business Enterprise ("LBE") subcontracting goal, as a result there will be no Pre-Proposal Conference. However Proposers are encouraged to submit questions related to the RFP.

Questions about this RFP will be accepted before **12 p.m. on February 19th, 2013**.
Please e-mail questions to Sheila Layton at Sheila.Layton@Sfgov.org.

After the questions are reviewed, questions and answers pertaining to the RFP will be posted by **5 p.m. on February 28th, 2013** on the Juvenile Probation Department website at:
http://sfgov3.org/index.aspx?page=549 or http://mission.sfgov.org/ocabidpublication/.
No phone calls will be accepted. Proposers are specifically directed NOT to contact any other employees or officials of the City, except to follow up with the Human Rights Commission to inquiry about Chapter 12B provisions. Unauthorized contact may be cause for rejection of proposals at the City's sole and absolute discretion.

4. Proposal Submission Requirements

[Note: Prior to the proposal submission deadline, and BEFORE SUBMISSION OF YOUR PROPOSAL, you may need to submit certain documents in order to fulfill the administrative requirements for doing business with the City. See Attachment III.]

A. Time and Place for Submission of Proposals
Proposals and all related materials must be received by **March 14th, 2013 (12 p.m. PT).** Proposals may be delivered to the Reception Desk at the Juvenile Probation Department or to:

> **Sheila Layton**
> **Juvenile Probation Department**
> **375 Woodside Avenue, Room 206**
> **San Francisco, CA 94127**

Postmarks will not be considered in judging the timeliness of submissions. Proposals submitted by e-mail or fax will not be accepted. Late submissions will not be considered, including those submitted late due to mail or delivery service failure. Note that Proposers hand-delivering proposals to 375 Woodside Avenue San Francisco, CA 94127 may be required to open and make packages accessible for examination by security staff.

B. Proposal Package
The following items must be included in your proposal and packaged in a box or envelope clearly marked **RFP# 121102 Web-Based Case Management**.

Complete and concise proposals are recommended for ease of review by the Evaluation Team. Proposals should provide a straightforward, concise description of the Proposer's capabilities to

satisfy the requirements of the RFP. Marketing and sales type information should be excluded. All parts, pages, figures, and tables should be <u>numbered and clearly labeled</u>.

1. **Original printed proposal (with original signatures) labeled as "Original". [Note— your proposal should be printed on Attachment V at the location indicated.] The original should include:**

    RFP Attachment I   Acknowledgement of RFP Terms and Conditions (Word)
    (signed and completed as indicated)

    RFP Attachment III   City's Administrative Requirements (As outlined on the attachment, "City's Administrative Requirements", any documents you are required to submit pursuant to that attachment must be submitted as soon as possible, IN ADVANCE OF SUBMISSION OF YOUR PROPOSAL)

    RFP Attachment IV   City's Agreement Terms and Conditions (Word)
    (include proposed modifications to Agreement, if any)

    RFP Attachment V   Proposal Template (Word)
    (with all items completed)

    Table of Mandatory Requirements (See Scope of Work, above)
    (include on the table your "response code" for each requirement; also include any additional pages needed to explain any response of "varies" (V) to a particular requirement. (see instructions for section 2 above)

    [Note: There is no "Attachment II" for this RFP.]

2. **One (1) FLASH DRIVE or CD-ROM containing entire contents of proposal, including all Attachments.** The CD-ROM and electronic files on the CD-ROM must be labeled with the Proposer's name. All files should be submitted in unprotected PDF or Word format. Electronic files should include signatures, where applicable.

3. **Five (5) complete printed copies of Attachment V**. Proposers are advised to review Attachments I through IV <u>before</u> beginning work on the proposal template in Attachment V to ensure they can meet the City's requirements.

5. Evaluation Criteria

This section describes the guidelines used for analyzing and evaluating the proposals. It is the City's intent to select Proposer(s) for contract negotiations that will provide the best overall service package to the City inclusive of fee considerations. Proposers selected for contract negotiations are not guaranteed a contract. This RFP does not in any way limit the City's right to solicit contracts for similar or identical services, if the City determines the proposals do not adequately satisfy its needs.

A. Evaluation Team
City representatives will serve as the Evaluation Team responsible for evaluating Proposers. The team will be responsible for the evaluation and rating of the proposals, for conducting interviews, rating presentations and for conducting reference checks.

B. Minimum Qualifications
Any proposal that does not demonstrate that the Proposer meets these minimum qualifications by the proposal deadline will be considered non-responsive and will not be further evaluated or eligible for award of any subsequent contract(s).

Qualifications:

1. Proposer must have a demonstrated understanding of requirements related to child welfare and juvenile justice programming by having completed two (2) projects of similar scope. The lead staff proposed to be assigned to this project must each previously had a substantially similar lead role in at least one (1) of the projects described in the Prior Projects section below.

2. **Technical Server Requirements**
   a. Windows Server
   b. SQL Server 2008 R2
   c. SQL Reporting Services
   d. Microsoft .Net Framework 3.5 or 4.0
   e. Web-Based Application running on Internet Information Services (IIS)
   f. Application should support 150-250 Users
   g. Internet Explorer 8.0 or greater

C. Proposal Evaluation Criteria (100 points)
Each proposal will be evaluated in accordance with the criteria below.

1. **Quality of Proposal (10 points)**
   a. Conformance with and applicability of information to RFP requirements
   b. Clarity of organization and exposition

2. **Qualifications (30 points)**
   a. Experience creating Web-Based Case Management Systems
   b. Quality, comparability, and applicability of recently completed projects including scope, level of effort, costs, timelines, deliverables and outcomes and experience in California
   c. Proposed staff's direct experience working with Web-Based Case Management Systems or other similar systems

3. **Approach and Methodology (40 points)**
   a. Understanding of the project, the tasks to be performed and the deliverables and outcomes as outlined in the above Scope of Work
   b. Clarity of staff roles and responsibilities
   c. Ability to effectively use project management, analytical, interpersonal, oral, written and presentation skills to successfully complete the project and communicate effectively with people of diverse backgrounds, abilities and expectations

d. Ability to demonstrate time and resource commitment for this project or to work on several projects with several clients effectively and transparently
e. Ability to meet mandatory functional requirements

4. **Cost of Project (20 points)**
   a. Clarity of costs, work efforts, and time frames for the services described in this RFP. All Proposers must base their expenditures on an hourly basis, which shall include overhead expenses and materials and supplies. Cost of licensing may be considered separately. Total cost must be included in the response.

D. Contractor Selection Process
Contractor Selection Panel Review
Following the Proposal Evaluation process, up to the top 3 scoring Proposers may be invited to give a presentation and take part in an interview with the Evaluation Team. The Panel Review will consist of ranking and evaluating interviews and presentations. During this selection process, each Proposer can receive up to a total of 100 points combined for its presentation and interview. Points awarded for presentations and interviews will be separate from the points awarded during the Proposal Evaluation process. The lead staff members that the Proposer intends to assign to the project should be present for the presentation and interview.

1. **Presentation (50 points)**
   The following will be used to evaluate the presentation:
   a. Professionalism of presentation and effectiveness of communication through the demonstration of the Proposer's product
   b. Ability to address project needs discussed in the Scope of Work, including mandatory functional requirements
   c. Quality of presentation including completeness and accuracy of information

   The presentation shall consist of a vendor demonstration which is described below:

   Proposer Demonstrations
   Finalists will conduct in depth on-site demonstrations at the JPD office. The demonstrations must use the same products being proposed and provide enough functionality to simulate the functions and business processes being proposed. Each proposer will be asked to provide a demonstration of their product using demonstration instructions provided by JPD. This document will be designed to provide the proposers and demonstration participants with the information that will be necessary to provide and evaluate the demonstration. The detailed scenarios will follow the normal business flows so that JPD will be able to understand how various components of the proposed system work together. The demonstration should allow members of JPD to have a "hands on" live test demonstration.

   Failure to provide an on-site demonstration at the JPD Office will eliminate the proposer from further consideration for this project. Proposers will receive written confirmation of their demonstration date with a copy of the vendor demonstration script. Proposers are responsible for their own demonstration equipment and should provide information to JPD regarding any required internet connectivity at least one week prior to the scheduled demonstration.

Demonstration Objectives
- Demonstrate Proposer's implementation of JPD's requirements to such a level that JPD is confident that key requirements are met by the proposer's solution
- Evaluate the user interfaces
- Evaluate the effort required to access desired functions or data
- Evaluate the effort required to escape from a function or from the system in a recoverable manner

2. Interviews (50 points)

Interviews will consist of standard questions asked of all of the Finalists, and proposal-specific questions regarding the presentation provided by individual Proposers. The scoring for proposal-specific questions will be weighted less than the standard questions to reduce the subjectivity of the interview evaluation process. The City has sole and absolute discretion over whether interviews will be conducted or not to select Proposers for contract negotiations.

3. Reference Checks

Reference checks may be used to determine the applicability of Proposer experience to the services the City is requesting and the quality of services and staffing provided to prior clients, including adherence to schedules/budgets and Proposer's problem-solving, project management, and communication abilities, as well as effectiveness of performance, deliverables and outcomes. Please see Attachment I, Section 14, Release of Liability.

4. Other Terms and Conditions

The selection of any Proposer for contract negotiations shall not imply acceptance by the City of all terms of the proposal, which may be subject to further negotiation and approvals before the City may be legally bound thereby. The Juvenile Probation Department will select the most qualified and responsive Proposer with whom JPD staff will commence contract negotiations. If a satisfactory contract cannot be negotiated in a reasonable time with the selected Proposer, then JPD, in its sole discretion, may terminate negotiations and begin contract negotiations with the next highest scoring Proposers it deems qualified. The Juvenile Probation Department, in its sole discretion, has the right to approve or disapprove any staff person assigned to its projects before and throughout the contract term. JPD reserves the right at any time to approve, disapprove, or modify proposed project plans, timelines and deliverables.

6. Protest Procedures

A. Protest of Non-Responsiveness Determination

Within five (5) working days of the City's issuance of a notice of non-responsiveness, any Proposer that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest by mail or e-mail (fax is not acceptable). Such notice of protest must be received by the City on or before the fifth (5th) working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

B. Protest of Contract Award

Within five (5) working days of the City's issuance of a notice of intent to award a contract under this RFP, any Proposer that has submitted a responsive proposal and believes that the City has incorrectly selected another Proposer for award may submit a written notice of protest by mail or e-mail (fax is not acceptable). Such notice of protest must be received by the City on or before the fifth (5th) working day after the City's issuance of the notice of intent to award a contract.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

C. Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) or by fax will not be considered. Protests must be delivered to:

> **Sheila Layton**
> **Juvenile Probation Department**
> **375 Woodside Avenue**
> **San Francisco, CA 94127**
> **Sheila.Layton@Sfgov.org**