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**Case Management System Licensing, Maintenance, and Implementation Services**  
**RFP # P-4-19-01**  
**February 6, 2019**  
**Addendum 2**

**TO ALL PROSPECTIVE BIDDERS**

This is an Addendum to and shall be considered as part of the original Proposal package for the above mentioned Proposal. Please acknowledge receipt of all Addenda in space provided on the attached Revised Appendix F Reply Certification Sheet, and return with proposal package.

**QUESTIONS AND REPOSSES**

Pages 2 through 8 of this addendum contain responses to questions received.

**CORRECTION**

Addendum 1 incorrectly references a Revised Cost Information Sheet. There is no Revised Cost Information Sheet.

The Proposal due date and time remains February 21, 2019 at 2:00 p.m. Late proposals shall not be accepted.

All other terms and conditions remain unchanged.

Sincerely,



Steven A. Darling, Jr.  
Purchasing and Contracts Manager

Enclosure: Revised Appendix F Reply Certification

cc: file  
Clerk of the Court



**Clerk of the Circuit Court, Brevard County, Florida**

Administration P.O. Box 999, Titusville, Florida 32781-0219  
Telephone: (321) 637-5413 · www.brevardclerk.us

**Scott Ellis, Clerk**

Addendum 2  
RFP P-4-19-01

**ADDENDUM 2, QUESTIONS AND ANSWERS**

**1. Please provide the number of concurrent users; how many users will be using the CMS?**

The Clerk will have approximately 300 users, a minimum of 200 of which should be able to access the system concurrently.

**2. Please break down the number of users by group.**

With regard to use of the CMS, all users will be Clerk users with varying levels of internal access dependent on their role. With regard to any public access website, the Clerk expects responsive vendors to support all roles contemplated by AOSC14-19 (as subsequently amended, and most recently, AOSC 18-16) and to support all future modifications as proposed by the Supreme Court of Florida.

**3. Please provide the interface diagram listed as being in Section 1.8 mentioned in Section 3.22 interface & Data Exchange implementation; Section 3.22 of the RFP refers to interface diagrams in Section 1.8 which we could not locate. Could you please provide?**

The second sentence in the first paragraph of section 3.22 was included in error. Please disregard. The integrations to be made are answered further herein and as outlined in section 1.4. Additional integrations may be necessary depending on the level of completeness and inclusiveness of the awarded vendor's solution.

**4. Please provide required functionality/specifications for the Jury module.**

The Clerk anticipates responsive vendors to either (1) provide a jury module product that is Supreme Court compliant or (2) can interface with the Clerk's current vendor, CHT, or another vendor currently providing jury services to Florida's clerks of court. At a minimum, the solution should be able to prepare summons for jurors; to include necessary state and internal reports and other forms as necessary; integrate with the CMS's financial modules, as necessary; and support the random selection of jurors using a Supreme Court-approved algorithm.

**5. How many databases need to be converted?**

At least one database will need to be converted, that being the FACTS CMS application. Depending on the specific vendor's application selected, additional databases may need to be

converted, including, but not limited to Vista’s NetDMS for court images; CSI’s Trakman; and CHT’s jury product, if the vendor proposes a suitable replacement product. The Clerk would also refer back to section 1.4 of the RFP.

**6. Are there any required integrations? If so, what are they?; Please provide the total number of interfaces requested by the County?**

The Clerk refers the requestor to section 1.4 of the RFP. Specifically, the vendor will need to either provide for the (1) conversion of certain data from the legacy system(s) indicated if the vendor’s application supports the functionalities listed which are currently provided by another vendor or (2) integrate with the listed items provided. In addition, the Clerk expects the vendor to be able to integrate with iCMS for the judiciary interface, a suitable application for redaction, the Florida Courts E-Filing Portal, as well as to provide seamless integration with the Clerk’s recording package, Acclaim from Harris Recording Solutions.

**7. Please provide the total database(s) size for conversion from the legacy system FACTS and others. Additionally the number of cases, tables and records for conversion.**

As of the date of this addendum:

<u>Size</u>		<u>Case Counts</u>	
FACTS	250GB	CF	238,528
System Tables	40GB	CA	181,311
Database Tables	1,632GB	CC	144,293
Views	512GB	CJ	104,869
<b>Total</b>	<b>2,184GB</b>	DP	12,326
		CT	311,738
		DR	257,384
		AP	3,013
		CO	3,170
		CP	74,020
		GA	28,557
		IN	160,474
		MH	24,046
		MM	333,835
		<b>Total</b>	<b>2,134,948 Cases</b>

Each case can contain thousands of “records.” A more granular listing can be provided to finalists upon request.

- 8. Can you specify the number of references requested by the County?; Section 3.10 requests five (5) references for similar sites, and Appendix C requests at least two (2) within the state of Florida. Which is correct, or both?**

The Clerk refers the requestor to section 3.10 of the RFP, which provides that a vendor may provide up to five (5) vendor references. At a minimum, a vendor should provide at least two (2) vendors as indicated on Appendix C. There is a typographical error in section 3.10 which refers to Appendix B, but should instead refer to the table listed in Appendix C. Appendix C requires that at least two references be provided “that most closely reflect similar CMS projects to [the] Clerk’s scope of work” of a “fully functioning CMS” that is “within the state of Florida.” Up to three additional references may be provided from either inside or outside the State of Florida. If the vendor does not have their CMS operational in at least two Florida counties, they are requested to indicate such.

- 9. Is the County requesting a portal for outside access into the system? If so, can you please list who would need access?**

The Clerk expects that outside users will be able to access replicated data in compliance with the Supreme Court of Florida’s AOSC 14-19 (as subsequently amended) for access to case data. We do not anticipate needing a Portal to access directly into the database at this time.

- 10. Will the County need an eFiling component to the system as well?**

A vendor is expected to have the capability to receive and transmit data to the Florida Courts E-Filing Portal (the “Portal”), either individually or through an integration with a third party platform as e-filing is mandatory for members of The Florida Bar and the Clerk works with a number of offices to promote e-filing, and e-files documents itself through the Portal.

- 11. Page 16; Section 1.7 “Qualifications of Vendors” states that vendors are required to provide a list of all lawsuits against the company for the last 5 years or a sworn statement verifying there is legal matters involving claims about pending work of a similar nature, whether the work is complete or not. Is a statement required if there are no legal actions pending? Is there a specific form or template that the Clerk would like completed for this purpose? Where in the response sections should this statement be included?**

Vendors who have not had any lawsuits or pending legal action during the previous five (5) year period should indicate such in a statement to be included in Reply Section 5 regarding Company Background. A vendor who does not include a statement or listing to either effect—that they do or do not have actions during the requested time period—will be deemed non-responsive.

**12. Approximately how many employees are located at each of the 6 individual locations?**

We have approximately 120 users in our 400 South Street branch; approximately 40 users at our 700 S. Park Avenue branch; less than 10 at our Merritt Island Branch; 10 at our Melbourne Branch; less than 10 at our Jail branch; less than 10 at our Palm Bay branch; and 100 users at our Viera branch.

**13. Where is the data for Traffic housed? Is it in your in house system or in your case maintenance application? If the data is stored in the in house Traffic system is there system documentation (ICD, data dictionaries, etc.) that will be supplied for data conversion purposes?**

The data is stored in the legacy CMS, FACTS.

**14. What General Ledger system does Brevard utilize?**

The Clerk uses SAP for its general ledger system.

**15. Does Brevard process collections in-house or utilize a collection agency(s)? If a collection agency(s) is utilized, what agencies are used for which case types?**

The Clerk utilizes external collection agencies for many of its case types, including criminal and civil case types. Currently, the Clerk has contracts with Linebarger and MSB and they are split alphabetically in half by party last name. However, the Clerk is currently in the midst of an RFP for collection services and these vendors are subject to change. A vendor is expected to have flexibility to allow the system, with help of the Clerk's I.T., to integrate and exchange data with any future collection agency.

**16. How does Brevard currently interface to the e-filing portal?**

Currently, the Clerk utilizes a service from VistaSG in order to pull the XML file from the Portal and extract data for the CMS (FACTS) and the DMS (netDMS).

**17. Following contract start, is there a desired timeframe within which to complete the implementation and Go Live of the new CMS system?**

The Clerk is hopeful that the successful vendor will be able to convert legacy data and complete interfaces so that the Clerk may "go live" with the new solution within 18 months from the contract start date. The Clerk realizes that implementations of systems of this size are fluid, however, the Clerk does not anticipate the process exceeding 24 months barring extenuating circumstances.

**18. Where in the Cost Reply should design, development, and other implementation costs (not software licenses or maintenance) be included? Under the Other Costs/Services?**

Yes; these would be appropriate costs to include in the "Other Costs/Services" portion.

**19. May we assume fixed price payment milestones will be negotiated for the implementation work? Should proposed milestones be included in the Cost Reply or deliverables list?**

The Clerk will negotiate the fixed price payment milestones with vendors who are finalists. Milestones may be included as part of the Cost Reply, but are not required at this time. Finalists will be required to provide suggested milestone breakdowns regarding payment at the appropriate time..

**20. We have multiple teammates and vendors supporting our offering. May key personnel, staff qualifications, and client references be drawn from across our team?**

Yes; a vendor may use third parties to provide the necessary components required or requested in the RFP so long as the integration is seamless. With regard to references, the Clerk refers the requestor back to section 3.10 regarding the total number of references permitted and Appendix C regarding the requirements therein.

**21. Is there a requirement or preference for on premise versus cloud-based implementations?**

For the purposes of implementation, the Clerk prefers to have vendor staff available in person to assist with any necessary changes or issues that may arise over the course of implementation. The Clerk does not mind conducting certain meetings via conference call or other communication methods throughout the process, but anticipates having "boots on the ground" for crucial milestones and at points negotiated between the Clerk and the vendor, including training, final implementation, and go-live.

With regard to storage of data on a post go-live basis, the Clerk strongly prefers on premise storage of data and solutions that support this option.

**22. Is a 10-year contract contemplated or a base contract with option years?**

The Clerk anticipates a 10-year contract period which may include renewal option periods in one-year increments depending on negotiations with finalists or upon selection.

**23. Are there any ADA (Section 508) website accessibility requirements for disabled users?**

As indicated herein and in the RFP (refer to section 1.4), the vendor will be required to provide an online public access piece for access to case data pursuant to the Supreme Court of Florida's requirements. The Clerk anticipates that this website should be as compliant as possible with ADA requirements to avoid any unnecessary or unwanted complaints or actions regarding usability.

**24. Is there an incumbent integration contractor supporting the existing CMS applications?**

Minimal support may be available from the Clerk's current CMS vendor, CentralSquare Technologies. Otherwise, the Clerk's I.T. and other senior staff will be working with the selected vendor on integration of data and other pieces to a new CMS solution.

**25. Addendum 1 - We are to acknowledge receipt of Addendum #1 in the Revised Cost Information Sheet, but the cost sheet was not attached.**

Reference to a Revised Cost Information Sheet was an error. There is no revision. Vendors are expected to acknowledge receipt of all issued addenda by acknowledging the same in the attached Revised Appendix F, along with the Reply Certification provided there.

**26. RFP Section 3.4 Scope of Work/Services - Did the County intend to reference Section 1.5 instead of Section 5 in the requirement?**

No; the County intended to refer to Reply Section 4, not Section 5. All items discussed in section 3.4 should appear in Reply Section 4 – also titled with the corresponding title “Scope of Work/Services.” As a general note, if there is a discrepancy between where an item required in section 3 is to be placed into the reply to the RFP, the Reply Section table controls. Each reply item listed in section 3 has a corresponding Reply Section in the table, and should be answered in that section.

**27. Is the current CMS split into multiple instances or do all offices use the same backend database?**

All offices use the same backend database.

**28. Do you currently process criminal cases with multiple defendants?**

We do not have multiple criminal defendants on a single case; we do, however, require the ability to add co-defendant cases (i.e. 05-2018-CF-012345-AXXX-XX's co-defendant case would be 05-2018-CF-012345-BXXX-XX). Routinely, co-defendants are not identified at the time of filing of a criminal case. This office regularly transfers criminal cases to co-defendant case numbers (as exemplified above) to indicate co-defendant status.

**29. Is all of the financial data in scope for conversion included in the CMS system? And can you provide balancing information if requested?**

Yes; all of the financial data subject to this conversion is within the CMS's tables. Additionally, we can provide balancing information.

**30. Are documents (PDF, TIF, JPG, etc.) stored on a file server or in a database as a blob? If the documents are stored in the database who will be responsible for extracting the files?**

Currently, the images are stored inside VistaSG's netDMS on a file server, not in a database BLOB. The Clerk is amenable to considering a built-in document management system solution. As such, the document images would need to be extracted and converted by the selected vendor and associated with the appropriate barcode I.D. associated with each image inside the CMS. Each item which contains an image has a specific barcode I.D. that is associated to the image in question.

As an additional point, at this time, all of the Clerk's images are .TIF. The Clerk realizes the Supreme Court of Florida has made .PDF the standard for court images with a future deadline and will work with the selected vendor on that matter.

**31. Who is the vendor used for Official Records?**

The Clerk currently uses Harris Recording Solutions' Acclaim solution. The product went live at the end of 2018.



**REVISED APPENDIX F  
REPLY CERTIFICATION**

The following certifies that this Request for Quote (RFP) is submitted without prior understanding, agreement, or connection with any corporation, firm, or person submitting an RFP reply for the same materials, services, and supplies and is, in all respects, fair and without collusion or fraud.

The vendor certifies, by his or her signature below, that this reply is current, accurate, complete, and is presented to the Clerk for the performance of this contract in accordance with all the requirements stated in the RFP.

The vendor acknowledges receipt of all addenda as follows:

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_ / Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_ / Addendum No. \_\_\_\_\_ Dated \_\_\_\_\_

\_\_\_\_\_  
Signature of Signer

\_\_\_\_\_  
Printed Name of Signer

\_\_\_\_\_  
Title

\_\_\_\_\_  
Name of Company

SWORN TO AND SUBSCRIBED before me this \_\_\_\_\_ day of \_\_\_\_\_,  
20\_\_\_\_, by \_\_\_\_\_, who is  personally known  produced  
\_\_\_\_\_ as identification, and who did take an oath.

( S E A L )

\_\_\_\_\_  
Printed Name of Notary/Deputy Clerk

\_\_\_\_\_  
Notary Expiration