SUBJECT: APPLICATION/SOFTWARE FOR FAMILY COURT CASE MANAGEMENT SYSTEM

BID #: XF-0307-22

OPEN DATE: 2022-01-26

GENERAL GOVERNMENT AWARDS COMMITTEE

KIND AND BASIS OF CONTRACT: SUPPLY CONTRACT – PERIOD OF SERVICE WILL BE ONE YEAR FROM THE DATE OF AWARD

AGENCY: FOURTH JUDICIAL CIRCUIT OF FLORIDA

BASIS OF AWARD: ALL OR NONE TO THE LOWEST RESPONSIVE, RESPONSIBLE BIDDER

NUMBER OF BIDS INVITED: 37 **NUMBER RECEIVED:** 2 **OTHER:** 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Recommend approval to reject the bid of Dhawan Inc. DBA 909 Technologies due to not meeting bid specifications submitted as required in the solicitation.

Recommend approval of award to the next lowest responsive, responsible bidder SGS Technologies in the amount of $140,920.00 for APPLICATION/SOFTWARE FOR FAMILY COURT CASE MANAGEMENT SYSTEM. Period of service will be one year from the date of award.

Funding Source: 15203.413002.531090.000000.00000000.00000.0000000,
To be executed by purchase order(s).

Attachments: Recommendation Memo, Bid Tabulation Sheets, Bid Rejection Letter, Terms and Conditions, Specifications

ANALYST: For RUBEN OLA

RESPECTFULLY SUBMITTED: GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Eve Janocko, Trial Court Administrator, Fourth Judicial Circuit of Florida

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF GGAC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

FOURTH JUDICIAL CIRCUIT OF FLORIDA
FINANCE & ACCOUTING DEPARTMENT
501 WEST ADAMS STREET
JACKSONVILLE, FL 32202

MEMORANDUM

DATE: February 17, 2022

TO: Greg Pease, Chief of Procurement Division

FROM: Eve Janocko, Trial Court Administrator Eve Janocko 2/17/2022

RE: Approval of bid to SGS Technologie

Court Administration is requesting that SGS Technologie, be awarded the bid for Solicitation XF-0307-22. The lowest bidder did not meet the bid specifications and SGS Technologie is the next lowest bid. Please let us know if you have any questions.

Your favorable consideration of our request is greatly appreciated.

BID TABULATION SHEET

TITLE:	APPLICATION/SOFTWARE FOR FAMILY COURT CASE MANAGEMENT SYSTEM		DHAWAN INC DBA: 909 TECHNOLOGIES	SGS TECHNOLOGIE			
BID NO.:	XF-0307-22						
OPEN DATE:	January 26, 2022						
PURCHASING ANALYST:	RUBEN OLA						
BID ANNOUNCER: C. SPITLER, BID RECORDER: M. PIERCE							
No. Invited: (37)	No. Received (2)	No Bids: (0)					
ITEM	DESCRIPTION	QUANTITY	AMOUNT	AMOUNT	AMOUNT	AMOUNT	AMOUNT
1	Contractor to provide all labor, materials, equipment, expertise, tools of trade, supervision and transportation for the installation and completion of Application/Software for Family Court Case Management System	1 LOT		$ 140,920.00			
		GRAND TOTAL:		$ 140,920.00			
		MINIMUM REQUIREMENTS:					
		TERMS:	% DISC 365 DAYS				
		DELIVERY (Business Days):	6 Months/365 DAYS	6-7 Months			
		CONFLICT OF INTEREST:	✓	✓			
		ADDENDUM(S)(1,2,3)	✓	✓			
		NOTES:	BID REJECTED				

PROCUREMENT DIVISION

NOTIFICATION OF RECOMMENDED BID REJECTION

Date: February 18, 2022

Via Email: adhawan@909te.ch

Bidder's Name: Dhawan Inc. DBA 909 Technologies

Address: 3550 Watt Avenue, Suite 401
Sacramento, CA 95821

Contact Name: Ankur Dhawan, CEO

Bid No: XF-0307-22

Title: APPLICATION/SOFTWARE FOR FAMILY COURT CASE MANAGEMENT SYSTEM

Date Opened: January 26, 2022

REASON FOR RECOMMENDED BID REJECTION: The City intends to reject the bid due to not meeting bid specifications as required in the solicitation. The submitted bid was only intended for CORE functions for software and does not include desirable items/ (unknown requirements-detailed workflows, interfaces, connections to other systems, etc.).

If you wish to protest the recommended rejection of this bid, please respond in accordance with the City of Jacksonville's bid protest procedures and email a copy to the City Purchasing Analyst associated with the protested bid.

NOTE: This intended action is only a recommendation to the appropriate Awarding Authority. The authority recommending award for this bid is the General Government Awards Committee scheduled for Thursday, February 24, 2022 at 1:00 p.m.

Purchasing Analyst's Signature: *Ruben B. Ola*
RUBEN OLA, Purchasing Analyst

Ola, Ruben

From: Ankur Dhawan <adhawan@909te.ch>
Sent: Friday, February 18, 2022 11:54 AM
To: Ola, Ruben
Subject: Re: Notification of Recommended Bid Rejection: XF-0307-22 APPLICATION/SOFTWARE FOR FAMILY COURT CASE MANAGEMENT SYSTEM
Attachments: image001.jpg; Bid Rejection Letter Form - XF-0307-22. 909 TECHNOLOGIES.pdf

EXTERNAL EMAIL: This email originated from a non-COJ email address. Do not click any links or open any attachments unless you trust the sender and know the content is safe.

Thank you for notifying us.

Thanks.

On Feb 18, 2022, at 8:42 AM, Ola, Ruben <RubenO@coj.net> wrote:

Good Morning Mr. Dhawan,

Attached is notification of recommended bid rejection for the above subject solicitation.
Thank you for participation and appreciate your interest in doing business with the City of Jacksonville.

Sincerely,

Ruben Ola, Buyer
City of Jacksonville
Procurement Division
214 N. Hogan Street, Suite 800
Jacksonville, FL 32202
Phone: 904.255.8823
Fax: 904.255.8837
Email: rubeno@coj.net
One City. One Jacksonville.

TERMS AND CONDITIONS

APPLICATION/SOFTWARE FOR FAMILY COURT CASE MANAGEMENT SYSTEM

1. SCOPE

The Fourth Judicial Circuit of Florida through the City of Jacksonville, Florida is currently accepting bids to obtain source(s) of supply for the items as outlined in the bid documents provided. The purpose of this bid invitation is to obtain information about your firm and its ability to provide these items and to obtain pricing commitments for the purchase of APPLICATION/SOFTWARE FOR FAMILY COURT CASE MANAGEMENT SYSTEM as listed in the bid documents.

2. AWARD

Award will be **ALL OR NONE** to the lowest responsive, responsible bidder grand total amount. Bidders must bid on all items to be considered for award. ALL awards are subject to the availability of funds.

As per Section 126.114 of the City of Jacksonville Ordinance Code, preference will be given to a responsive and responsible vendor offering American manufactured, assembled, or produced goods, and who is within 5% of the lowest responsive and responsible bidder. To receive this preference, the bidder must complete the attached Buy American Preference Compliance Certificate and attach supporting documentation and/or evidence attesting that at least 51% offered in the bid response is manufactured, assembled or produced in the United States.

a. Bidder is not required to submit for the Buy American Preference. Bidders may quote items less than 51% American made but will not be eligible for the preference.

b. Restrictions and exemptions may apply. Please refer to Section 126.114 for specifics.

3. TERM OF AGREEMENT

The term of this agreement is one (1) year from date of award.

4. MINIMUM REQUIREMENTS

Bidders should submit or comply with the following requirements; failure to submit any of these requirements may be grounds for rejection:

a. The Contractor shall provide all business licenses required by local, state, and federal law as applicable.

5. STATE CONTRACTS

The City reserves the right to utilize contracts established by the State of Florida and or other governmental agencies for item(s)/service(s) covered under this bid. The city reserves the right to cancel this contract in whole or in part for such item(s)/service(s).

6. QUANTITIES

Quantities indicated reflect the estimated quantities to be purchased throughout the contract period and are subject to fluctuation in accordance with actual requirements. The City reserves the right to add or delete items, or increase the volume of services required, or not to make any purchase against this bid if it so deems necessary at any time during the contract period.

7. DELIVERY

Court Administration, 501 West Adams Street, Room 6197, Jacksonville, Florida 32202. A packing list shall accompany all shipments, which shall indicate, at a minimum, the following: purchase order number, item number and description, date of shipment, quantity ordered and shipped, unit prices, and unit of measure. Inside DELIVERY ONLY and if on pallets must be broken down for delivery.

8. ESCALATION/DE-ESCALATION

All pricing submitted shall remain firm for the initial term period. Upon renewal (if applicable), a supplier may submit in writing a request for price escalation/de-escalation for the percentage of change as listed in

the Consumer Pricing Index (CPI) and/or documentation notifying of an industry wide increase. The City reserves the right to decline any price increase request.

9. **PRICES**

All unit prices shall include freight, delivery, and handling charges to the delivery location as outlined in the bid documents.

10. **PICK UP AND RETURNS**

The City reserves the right to return an order in whole or in part if the merchandise is not in compliance with the bid specifications. The City or its agencies will determine compliance with bid specifications. Pick up and returns will be made within 48 hours of notification at no charge to the City or its agencies.

11. **COMPLIANCE WITH SPECIFICATIONS**

The bidder, by affixing their signature to the bid form submitted, agrees to provide item(s)/service(s) in accordance with the bid documents provided. Bid only a single offering for each bid item. Multiple offerings, alternates (unless stated) and or stipulations may be cause for bid rejection. Bid only on forms provided herein unless otherwise stated. Bid submissions shall be in ink or typewritten. All corrections must be initialed.

12. **INVOICING**

Invoices will be issued once supplies/services are delivered and/or rendered to the City of Jacksonville or its agencies. At a minimum, invoices must include: purchase order number or contract number, item number and description, date of shipment, quantity ordered and shipped, unit prices, unit of measure, and extended totals. Payment terms are Net 30 days. All original invoices shall be submitted through the City of Jacksonville 1Cloud procurement system or to: City of Jacksonville, General Accounting Division, 117 West Duval Street, Suite 375, Jacksonville, Florida 32202.

13. **INSURANCE/INDEMNIFICATION**

Each supplier shall maintain, for the entire term of this bid, current insurance coverage as stated in the bid documents. All insurance certificates shall list the City of Jacksonville as an additional insured. Bid number should be listed on certificate. The awarded bidder is required to submit their insurance certificate within ten (10) days after notice of award.

14. **REPORTING**

The City may request, during the term of this bid, reports including but not limited to; usage, pricing, and delivery. Suppliers will be required to provide reports requested in hard copy and electronic format as required.

15. **SUPPLIER ACCESSIBILITY**

The City or its representative must be able to contact, during normal business hours, by telephone or email any supplier providing goods or services to the City or its agencies. Any supplier accessibility requirements outlined in the specifications supersede this section.

SPECIFICATIONS

SCOPE OF WORK:

The Fourth Judicial Circuit of the State of Florida (the Court) has a separate application for its Family Court Services (FCS) division. Named the Family Court Case Management System (FCS CMS), it is a legacy application that lacks several features and utilizes outdated technology. The Court requires the complete rewriting of FCS CMS application with the integration of new as well as technologically advanced features. The purpose of this new application is to facilitate filing of case related to family law, divorces, domestic violence, and juveniles.

This new module will be required for FCS' staff to manage cases and schedule their hearings. The staff members of FCS can supervise the functioning of the new system and view the list of registered members. The required functionalities of the new module have to feature the following:

- Custom forms can be uploaded from the back end to the new module. The litigants (petitioners and respondents) should be enabled to fill these forms online. The data will then automatically get stored in FCS' data archives. The process of filing new cases will speed up with the inclusion of this functionality along with improvement in the levels of accuracy.

- Litigants and others involved in cases should be enabled to register themselves on the application following which they will be given unique IDs and usernames. Options need to be present for people of both sides to check the status of ongoing cases aswell as to register new cases. Besides custom forms in the previous stage, petitioners or respondents can manually enter certain details after logging-in. Details such as the selected attorney and litigant's information can be manually entered here.

- The staff of FCS will be the admin and case managers. Admin can supervise the overall functioning of the module and assign specific case managers. Admins can login as individual case managers. Admins can also revoke access of case managers if required, any time.

- The staff of FCS (Admin) will get reports from the Clerk's office and enters the details in the proposed case management system. A pop-up appears which automatically has the FCS' county, the year and department. The FCS' staff will then enter the case number, along with details of petitioner or respondent (depending on case), Division Judge, and the assigned Case Manager. Titles such as Mr., and Mrs., are not necessary but a column for Suffix is required (Jr., Sr.). Details can be saved and verified in case summary tab. Any changes made to the details will be reflected in this tab.

- Case Managers can map the information entered by litigants in the custom forms and this data will automatically appear in the relevant fields of the module. They will be able to view lists of pending cases that have been assigned to them, statuses of ongoing cases and also schedule hearings for cases. Admin can view reports on cases filed by each user and their results. Case managers must not be able to change the case status or modify the time required to look into a case.

- Red icons must be featured in the FCMS module to indicate cases that need immediate attention (such as first notices, cases waiting for hearing and hearings scheduled). Green icons will indicate cases that have been looked into. Case managers should be able to send notices to litigants, assign Family Law Coordinators for particular hearings and refercases for mediation among others. Admin can determine which case manager handles which

case through "Alpha Mapping". In this method, the first alphabet of the petitioner's or respondent's names will be used as the deciding factor. For example, the admin can determine one case manager should handle cases whose respondents have names starting from "A to K". However, this guideline can be overridden in cases related to dissolution of marriages. Such cases will be shown separately in a list. Any case manager can pick up the case and follow it. In addition to these functionalities, the new application should feature modules such as:

File a Case

In this module, litigants should be enabled to create new cases in the Family Court Case Management system. Fields such as case number and first/last name are fields that need to bemandatorily filled by the petitioners. The FLC (Family Law Coordinator) and Expected Arrival Date fields will get filled automatically as they will be assigned by the Case Manager. However, this assignment canbe overridden by clicking CPS/GMA (Court Program Specialist/General Master Assistant) drop-down list and selecting a different FLC.

Maintenance / Settings

The main admin of the application can assign roles and responsibilities to each person involved in the case. The admin can define who will be case managers, who will be the court's staff members and who will be general master assistants in the application. Registered lawyers are also added to the database by the super-admin. In addition, the super admin can also create and maintain group lists of all the court's employees. A Case manager can assign a FLC based on the first letter of a petitioner's last name and the division a petitioner selects from the drop-down list. As mentioned in the earlier point, a petitioner can override this assignment in cases related to dissolution of marriages.

Daily File Request

- **Case Summary:**

  - **Case Status**: A new petition will be visible to the assigned case manager. The case manager can select any case and update its status. For example, a case can be marked as New Petition, 1st Notice, or 2nd Notice. New petition is the status while filing a new case. If the case manager feels some documents are missing; the status will be moved to first notice. If no documents are missing during verification, the case status can be moved to mediation or case hearing. Each status refers to incidents wherein certain documents are missing while recording cases. If no response was received for the first request, a second notice will be sent, and case status will be marked as such. There will be a timeline of 28 and 30 days between sending the first and second notices. A 30-Day trickle status refers to sending a litigant the final review letter. A 15-day trickle status is when case managers have contacted the litigant, and he/she sounds promising. Then the case manager can shift the status to 15-day trickle instead of waiting for an entire 30 days. An important ability of case managers is that they can simply bypass levels from new petition to case filing if required without going through multiple review stages. Post filings will refer to reopening of older cases or making modifications to cases that have been closed. The specific date that the cases were opened by the case managers will be displayed here.

    Notifications will be generated when an active status is attempted to be removed. Also, case managers will not be able to change the time trickle in case statuses. If they attempt to change, a pop-up will generate asking them to submit a review letter at first which have to be approved by the admin.

- **Case Definition**: Specific details such as the county number, year, department, case number, division, and branch can be set here.
- **Hearing Dates:** The assigned hearing dates, time, and duration can be set by the case managers.

➢ **Case Information:**

- **Case Events:** New case statuses may be added and/or existing status may be deleted in the proposed system. Admins will be able to set time limits for case managers to look into and process cases that have been assigned for them.
- **Case Documents:** Documents can be uploaded, or information can be merged with existing documents. This will be done through the case document tab on the new system.

➢ **History of Changes:** The internal users must be able to view all changes and/or modifications made to case information.

➢ **Case Notes:** Notes can be inserted by case managers in cases of reviews or need for reexamination. This section can only be accessed by the FCS' staff. The history of all notes will also be visible.

➢ **Contact Information**: Personal details of petitioners as well as litigants can be entered here, and it will reflect in the case information tab. These details include first name/middle name/surname, suffix, title, address, email, and modifications made to the address.

➢ **Mediation:** Details of the mediations for each case along with the time frames can be entered in this tab.

Reports

The admin can view reports on each petitioner, case manager, types of cases, and other factors within a specified date range. These reports also include case management reports, mediation reports and general master reports. These reports will give FCS' staff insights on the types ofcases that are heard across courts in Duval County as well as their outcomes.

Search for Cases

The case manager can search easily for cases assigned using the county number and year. For example, 16-2021-DR; it will show display a list of cases.