SERIAL 12112 RFP MCSO JAIL MANAGEMENT SYSTEM (JMS) CONSULTANT/PROJECT MANAGER

DATE OF LAST REVISION: January 23, 2013 CONTRACT END DATE: January 31, 2017

CONTRACT PERIOD THROUGH JANUARY 31, 2017

TO: All Departments

FROM: Office of Procurement Services

SUBJECT: Contract for **MCSO JAIL MANAGEMENT SYSTEM (JMS) CONSULTANT/PROJECT MANAGER**

Attached to this letter is published an effective purchasing contract for products and/or services to be supplied to Maricopa County activities as awarded by Maricopa County on **January 23, 2013.**

All purchases of products and/or services listed on the attached pages of this letter are to be obtained from the vendor holding the contract. Individuals are responsible to the vendor for purchases made outside of contracts. The contract period is indicated above.

_____
Wes Baysinger, Chief Procurement Officer
Office of Procurement Services

PA/ua
Attach

Copy to: Office of Procurement Services
Amie Bristol, MCSO

EXHIBIT A
PRICING

SERIAL 12112-RFP
NIGP CODE: 95877, 96156

COMPANY NAME:	Informatix, Inc.
DOING BUSINESS AS (DBA) NAME:	Informatix, Inc.
MAILING ADDRESS:	1740 Creekside Oaks Drive, Suite 175
	Sacramento, CA 95833
REMIT TO ADDRESS:	1740 Creekside Oaks Drive, Suite 175
	Sacramento, CA 95833
TELEPHONE NUMBER:	916.830.1400
FACSIMILE NUMBER:	916.830.1403
WEB SITE:	www.informatixinc.com
REPRESENTATIVE NAME:	Michele Blanc
REPRESENTATIVE PHONE NUMBER:	916.830.1400
REPRESENTATIVE E-MAIL:	Michele.Blanc@Informatixinc.com

WILL ALLOW OTHER GOVERNMENTAL ENTITIES TO PURCHASE FROM THIS CONTRACT: YES

WILL ACCEPT PROCUREMENT CARD FOR PAYMENT: NO*

*It was determined in our Master Service Agreement for Outside Audit, Cost Allocation, Grant/Program Support & Other Consulting Services with Maricopa County (#12049-RFP), that we do not have to accept procurement cards for payment.

1.0 PRICING:

Firm fixed pricing, not to exceed, for each phase to include all work delineated herein.

PHASE 1: County JMS Review	$	568,081.00
PHASE 1: Travel	$	27,648.00
PHASE 2: Procurement from SOW Development through JMS Contract Award	$	327,624.00
PHASE 2: Travel	$	9,688.00
PHASE 3: Project Management of JMS*	$	953,102.00
PHASE 3: Travel*	$	18,668.00
PROPOSAL TOTAL:	$	1,848,807.00
PROPOSAL TOTAL WITH TRAVEL:	**$**	**1,904,811.00**

***The County reserves the right to determine if Phase 3will be performed by the Contractor or the County.**

PAYMENT SCHEDULE:

PHASE 1:	**Complete Current** County JMS Review	15%	
	Phase 1 Progress Payment #1	25%	*
	Phase 1 Progress Payment #2	25%	*
	Phase 1 Progress Payment #3	25%	*
	Phase 1 Completion	10%	

* Progress Payments to be made at specific completion points mutually agreed upon by MCSO and the Consultant

PHASE 2:	Procurement from SOW Development through JMS Contract Award Commencement of Phase 2 Work	10%
	JMS Replacement RFP is Advertised	50%
	Board of Supervisors Award of JMS Replacement Contract	40%

PHASE 3:	Project Management of JMS Commencement of Work	15%
	Approval of Fit/Gap Analysis & Architecture	10%
	Completion of Test/Production Environments Set-Up & Project Team Training	10%
	Approval of Written Plans for Data Conversion & Data Interfaces	5%
	Approval of Comprehensive Written Plan for System Testing	10%
	Acceptance of System Set-Up Activities (Tables, Configurations, etc.)	10%
	Acceptance of System Testing, Including Problem Resolution	10%
	Approval of System & User Documentation and Completion of User Training	5%
	Approval of Written Procedures for Post Go-Live Support	5%
	Successful Cutover (“Go-Live”) including Data Conversion and Data Interfaces	10%
	Phase 3 Completion (Project Closeout)	10%

ADDITIONAL PRICING

Hourly rates for "out of scope" project personnel *Excludes travel*

Title	Project Position	Hourly Fee
Engagement Manager	Project Manager	$157.00
Project Manager	Phase Leader	$125.00
IT Manager	Senior Technical Analyst	$125.00
Subject Matter Expert	Senior Analyst	$100.00
Technical Specialist	Database Administrator	$100.00
Technical Specialist	Security Subject Matter Expert	$100.00
Senior Technical Analyst	Technical Analyst	$90.00
Analyst	Business Analyst	$85.00

INFORMATIX, INC., 1740 CREEKSIDE OAKS DR, STE 175, SACRAMENTO, CA 95833

PRICING SHEET: 95877, 96156

Terms:	NET 30
Vendor Number:	2011002167 0
Telephone Number:	916-830-1400
Fax Number:	916-830-1403
Contact Person:	Michele Blanc
E-mail Address:	Michele.Blanc@Informatixinc.com
Certificates of Insurance	Required
Contract Period:	To cover the period ending **January 31, 2017.**

CONTRACT PURSUANT TO RFP

SERIAL 12112-RFP

This Contract is entered into this twenty third day of January 2013 by and between Maricopa County ("County"), a political subdivision of the State of Arizona, and Informatix, Inc, a California corporation ("Contractor") for the purchase of consulting services to define requirements, procure, and implement a new Jail Management System (JMS). .

1.0 CONTRACT TERM:

1.1 This Contract is for a term of Four (4) years, beginning on the twenty third day of January, 2013 and ending the thirty first day of January, 2017.

1.2 The County may, at its option and with the agreement of the Contractor, renew the term of this Contract for additional terms up to a maximum of Two (2) years, (or at the County's sole discretion, extend the contract on a month-to-month bases for a maximum of six (6) months after expiration). The County shall notify the Contractor in writing of its intent to extend the Contract term at least thirty (30) calendar days prior to the expiration of the original contract term, or any additional term thereafter.

2.0 PAYMENTS:

2.1 As consideration for performance of the duties described herein, County shall pay Contractor the sum(s) stated in Exhibit "A."

2.2 Payment shall be made upon the County's receipt of a properly completed invoice.

2.3 INVOICES:

2.3.1 The Contractor shall submit one (1) legible copy of their detailed invoice before payment(s) can be made. At a minimum, the invoice must provide the following information:

- Company name, address and contact
- County bill-to name and contact information
- Contract serial number
- County purchase order number
- Invoice number and date
- Payment terms
- Date of service or delivery
- Quantity
- Contract Item number(s)
- Description of service provided
- Pricing per unit of service
- Freight (if applicable)
- Extended price

- Mileage w/rate (if applicable)
- Total Amount Due

2.3.2 Problems regarding billing or invoicing shall be directed to the County as listed on the Purchase Order.

2.3.3 Payment shall be made to the Contractor by Accounts Payable through the Maricopa County Vendor Express Payment Program. This is an Electronic Funds Transfer (EFT) process. After Contract Award the Contractor shall complete the Vendor Registration Form located on the County Department of Finance Vendor Registration Web Site (www.maricopa.gov/finance/vendors).

2.3.4 EFT payments to the routing and account numbers designated by the Contractor will include the details on the specific invoices that the payment covers. The Contractor is required to discuss remittance delivery capabilities with their designated financial institution for access to those details.

3.0 AVAILABILITY OF FUNDS:

3.1 The provisions of this Contract relating to payment for services shall become effective when funds assigned for the purpose of compensating the Contractor as herein provided are actually available to County for disbursement. The County shall be the sole judge and authority in determining the availability of funds under this Contract. County shall keep the Contractor fully informed as to the availability of funds. Contractor shall not be obligated to commence performance of the services until notified by County that the appropriate funds have been assigned to Contractor.

3.2 If any action is taken by any state agency, Federal department or any other agency or instrumentality to suspend, decrease, or terminate its fiscal obligations under, or in connection with, this Contract, County may amend, suspend, decrease, or terminate its obligations under, or in connection with, this Contract. In the event of termination, County shall be liable for payment only for services rendered prior to the effective date of the termination, provided that such services are performed in accordance with the provisions of this Contract. County shall give written notice of the effective date of any suspension, amendment, or termination under this Section, at least ten (10) days in advance.

4.0 DUTIES:

4.1 The Contractor shall perform all duties stated in Exhibit “C”, or as otherwise directed in writing by the Procurement Officer.

4.2 During the Contract term, County shall provide Contractor’s personnel with adequate workspace for Contractors and such other related facilities as may be required by Contractor to carry out its contractual obligations.

5.0 TERMS and CONDITIONS:

5.1 INDEMNIFICATION:

5.1.1 To the fullest extent permitted by law, Contractor shall defend, indemnify, and hold harmless County, its agents, representatives, officers, directors, officials, and employees from and against all claims, damages, losses and expenses, including, but not limited to, reasonable attorney fees, court costs, expert witness fees, and the cost of appellate proceedings, related to, arising out of, or alleged to have resulted from the negligent acts, errors, omissions or mistakes relating to the Contractor’s performance of this Contract. Contractor’s duty to defend, indemnify and hold harmless County, its agents, representatives, officers, directors, officials, and employees shall arise in connection with any claim, damage, loss or expense that is attributable to bodily injury, sickness, disease, death, or injury to, impairment, or destruction of property, including loss of use resulting there from, caused by any negligent acts, errors, omissions or mistakes in the

performance of the Contract including any person for who acts, error, omissions or mistakes Contractor may be legally liable.

5.1.2 The amount and type of insurance coverage requirements set forth herein will in no way be construed as limiting the scope of this indemnity in this paragraph.

5.1.3 The scope of this indemnification does not extend to claims, damages, losses and expenses, including, but not limited to, reasonable attorney fees, court costs, expert witness fees, and the cost of appellate proceedings, related to, arising out of, or alleged to have resulted from the negligent acts, errors, omissions or mistakes caused by the sole negligence of County. Additionally, Contractor's indemnity obligation under this Contract shall not extend to any claims, liabilities, losses, damages, costs or expenses (claims):

5.1.3.1 arising out of County' s alteration of work products provided by the Contractor or use of such work products outside the scope of use identified in the Contractor's proposal and delivery documentation or if County uses a version of the work product(s) which has been superseded, if the claim could have been avoided by using an unaltered current version of the work product which was provided to County;

5.1.3.2 based upon any information, design, specification, instruction, software, data, or material not provided by the Contractor; or

5.1.3.3 based upon the combination of any of the Contractor's work product(s) and or services with other deliverables and services not provided by the Contractor."

5.2 INSURANCE REQUIREMENTS:

5.2.1 Contractor, at Contactor's own expense, shall purchase and maintain the herein stipulated minimum insurance from a company or companies duly licensed by the State of Arizona and possessing a current A.M. Best, Inc. rating of A-, VII or higher. In lieu of State of Arizona licensing, the stipulated insurance may be purchased from a company or companies, which are authorized to do business in the State of Arizona, provided that said insurance companies meet the approval of County. The form of any insurance policies and forms must be acceptable to County.

5.2.2 All insurance required herein shall be maintained in full force and effect until all work or service required to be performed under the terms of the Contract is satisfactorily completed and formally accepted. Failure to do so may, at the sole discretion of County, constitute a material breach of this Contract.

5.2.3 Contractor's insurance shall be primary insurance as respects County, and any insurance or self-insurance maintained by County shall not contribute to it.

5.2.4 Any failure to comply with the claim reporting provisions of the insurance policies or any breach of an insurance policy warranty shall not affect the County's right to coverage afforded under the insurance policies.

5.2.5 The insurance policies may provide coverage that contains deductibles or self-insured retentions. Such deductible and/or self-insured retentions shall not be applicable with respect to the coverage provided to County under such policies. Contactor shall be solely responsible for the deductible and/or self-insured retention and County, at its option, may require Contractor to secure payment of such deductibles or self-insured retentions by a surety bond or an irrevocable and unconditional letter of credit.

5.2.6 County reserves the right to request and to receive, within 10 working days, certified copies of any or all of the herein required insurance certificates. County shall not be obligated to review policies and/or endorsements or to advise Contractor of any deficiencies in such policies and endorsements, and such receipt shall not relieve

Contractor from, or be deemed a waiver of County's right to insist on strict fulfillment of Contractor's obligations under this Contract.

5.2.7 The insurance policies required by this Contract, except Workers' Compensation, and Errors and Omissions, shall name County, its agents, representatives, officers, directors, officials and employees as Additional Insureds.

5.2.8 The policies required hereunder, except Workers' Compensation, and Errors and Omissions, shall contain a waiver of transfer of rights of recovery (subrogation) against County, its agents, representatives, officers, directors, officials and employees for any claims arising out of Contractor's work or service.

5.2.9 Commercial General Liability.

Commercial General Liability insurance and, if necessary, Commercial Umbrella insurance with a limit of not less than $2,000,000 for each occurrence, $2,000,000 Products/Completed Operations Aggregate, and $4,000,000 General Aggregate Limit. The policy shall include coverage for bodily injury, broad form property damage, personal injury, products and completed operations and blanket contractual coverage, and shall not contain any provision which would serve to limit third party action over claims. There shall be no endorsement or modification of the CGL limiting the scope of coverage for liability arising from explosion, collapse, or underground property damage.

5.2.10 Automobile Liability.

Commercial/Business Automobile Liability insurance and, if necessary, Commercial Umbrella insurance with a combined single limit for bodily injury and property damage of not less than $2,000,000 each occurrence with respect to any of the Contractor's owned, hired, and non-owned vehicles assigned to or used in performance of the Contractor's work or services under this Contract.

5.2.11 Workers' Compensation.

5.2.11.1 Workers' Compensation insurance to cover obligations imposed by federal and state statutes having jurisdiction of Contractor's employees engaged in the performance of the work or services under this Contract; and Employer's Liability insurance of not less than $1,000,000 for each accident, $1,000,000 disease for each employee, and $1,000,000 disease policy limit.

5.2.11.2 Contractor waives all rights against County and its agents, officers, directors and employees for recovery of damages to the extent these damages are covered by the Workers' Compensation and Employer's Liability or commercial umbrella liability insurance obtained by Contractor pursuant to this Contract.

5.2.12 Certificates of Insurance.

5.2.12.1 Prior to commencing work or services under this Contract, Contractor shall have insurance in effect as required by the Contract in the form provided by the County, issued by Contractor's insurer(s), as evidence that policies providing the required coverage, conditions and limits required by this Contract are in full force and effect. Such certificates shall be made available to the County upon 48 hours notice. BY SIGNING THE AGREEMENT PAGE THE CONTRACTOR AGREES TO THIS REQUIREMENT AND FAILURE TO MEET THIS REQUIREMENT WILL RESULT IN CANCELLATION OF CONTRACT.

5.2.12.1.1 In the event any insurance policy (ies) required by this contract is (are) written on a "claims made" basis, coverage shall extend for

two years past completion and acceptance of Contractor's work or services and as evidenced by annual Certificates of Insurance.

5.2.12.1.2 If a policy does expire during the life of the Contract, a renewal certificate must be sent to County fifteen (15) days prior to the expiration date.

5.2.13 Cancellation and Expiration Notice.

Insurance required herein shall not be permitted to expire, be canceled, or materially changed without thirty (30) days prior written notice to the County.

5.3 WARRANTY OF SERVICES:

5.3.1 The Contractor warrants that all services provided hereunder will conform to the requirements of the Contract, including all descriptions, specifications and attachments made a part of this Contract. County's acceptance of services or goods provided by the Contractor shall not relieve the Contractor from its obligations under this warranty.

5.3.2 In addition to its other remedies, County may, at the Contractor's expense, require prompt correction of any services failing to meet the Contractor's warranty herein. Services corrected by the Contractor shall be subject to all the provisions of this Contract in the manner and to the same extent as services originally furnished hereunder.

5.4 INSPECTION OF SERVICES:

5.4.1 The Contractor shall provide and maintain an inspection system acceptable to County covering the services under this Contract. Complete records of all inspection work performed by the Contractor shall be maintained and made available to County during contract performance and for as long afterwards as the Contract requires.

5.4.2 County has the right to inspect and test all services called for by the Contract, to the extent practicable at all times and places during the term of the Contract. County shall perform inspections and tests in a manner that will not unduly delay the work.

5.4.3 If any of the services do not conform with Contract requirements, County may require the Contractor to perform the services again in conformity with Contract requirements, at on increase in Contract amount. When the defects in services cannot be corrected by re-performance, County may:

6.4.3.1 Require the Contractor to take necessary action to ensure that future performance conforms to Contract requirements; and

6.4.3.2 Reduce the Contract price to reflect the reduced value of the services performed.

5.4.4 If the Contractor fails to promptly perform the services again or to take the necessary action to ensure future performance in conformity with Contract requirements, County may:

6.4.4.1 By Contract or otherwise, perform the services and charge to the Contractor any cost incurred by County that is directly related to the performance of such service; or

6.4.4.2 Terminate the Contract for default.

5.5 PROCUREMENT CARD ORDERING CAPABILITY:

The County may determine to use a MasterCard Procurement Card, to place and make payment for orders under the Contract.

5.6 INTERNET ORDERING CAPABILITY:

The County intends, at its option, to use the Internet to communicate and to place orders under this Contract.

5.7 NOTICES:

All notices given pursuant to the terms of this Contract shall be addressed to:

For County:

Maricopa County
Office of Procurement Services
ATTN: Contract Administration
320 West Lincoln Street
Phoenix, Arizona 85003-2494

For Contractor:
Informatix, Inc.
ATTN: Michele Blanc
1740 Creekside Oaks Drive, Suite 175
Sacramento, CA 95833

5.8 REQUIREMENTS CONTRACT:

5.8.1 Contractor signifies its understanding and agreement by signing this document that this Contract is a requirements contract. This Contract does not guarantee any purchases will be made (minimum or maximum). Orders will only be placed when County identifies a need and issues a purchase order or a written notice to proceed.

5.8.2 County reserves the right to cancel purchase orders or notice to proceed within a reasonable period of time after issuance. Should a purchase order or notice to proceed be canceled, the County agrees to reimburse the Contractor for actual and documented costs incurred by the Contractor. The County will not reimburse the Contractor for any avoidable costs incurred after receipt of cancellation, or for lost profits, or shipment of product or performance of services prior to issuance of a purchase order or notice to proceed.

5.8.3 Purchase orders will be cancelled in writing.

5.9 TERMINATION FOR CONVENIENCE:

The County reserves the right to terminate the Contract, in whole or in part at any time, when in the best interests of the County without penalty or recourse. Upon receipt of the written notice, the Contractor shall immediately stop all work, as directed in the notice, notify all subcontractors of the effective date of the termination and minimize all further costs to the County. In the event of termination under this paragraph, all documents, data and reports prepared by the Contractor under the Contract shall become the property of and be delivered to the County upon demand. The Contractor shall be entitled to receive just and equitable compensation for work in progress, work completed and materials accepted before the effective date of the termination.

5.10 TERMINATION FOR DEFAULT:

5.10.1 In addition to the rights reserved in the Contract, the County may terminate the Contract in whole or in part due to the failure of the Contractor to comply with any term or condition of the Contract, to acquire and maintain all required insurance policies, bonds, licenses and permits, or to make satisfactory progress in performing the Contract. The Procurement Officer shall provide written notice of the termination and the reasons for it to the Contractor.

5.10.2 Upon termination under this paragraph, all goods, materials, documents, data and reports prepared by the Contractor under the Contract shall become the property of and be delivered to the County on demand.

5.10.3 The County may, upon termination of this Contract, procure, on terms and in the manner that it deems appropriate and fiscally prudent, materials or services to directly replace those under this Contract. The Contractor shall be liable to the County for any reasonable excess costs incurred by the County in procuring materials or services in substitution for those due from the Contractor.

5.10.4 The Contractor shall continue to perform, in accordance with the requirements of the Contract, up to the date of termination, as directed in the termination notice.

5.11 STATUTORY RIGHT OF CANCELLATION FOR CONFLICT OF INTEREST:

Notice is given that pursuant to A.R.S. §38-511 the County may cancel this Contract without penalty or further obligation within three years after execution of the contract, if any person significantly involved in initiating, negotiating, securing, drafting or creating the contract on behalf of the County is at any time while the Contract or any extension of the Contract is in effect, an employee or agent of any other party to the Contract in any capacity or Contractor to any other party of the Contract with respect to the subject matter of the Contract. Additionally, pursuant to A.R.S §38-511 the County may recoup any fee or commission paid or due to any person significantly involved in initiating, negotiating, securing, drafting or creating the contract on behalf of the County from any other party to the contract arising as the result of the Contract.

5.12 OFFSET FOR DAMAGES;

In addition to all other remedies at law or equity, the County may offset from any money due to the Contractor any amounts Contractor owes to the County for damages resulting from breach or deficiencies in performance under this contract.

5.13 ADDITIONS/DELETIONS OF SERVICE:

The County reserves the right to add and/or delete products and/or services provided under this Contract. If a requirement is deleted, payment to the Contractor will be reduced proportionately to the amount of service reduced in accordance with the proposal price. If additional services and/or products are required from this Contract, prices for such additions will be negotiated between the Contractor and the County.

5.14 RELATIONSHIPS:

In the performance of the services described herein, the Contractor shall act solely as an independent contractor, and nothing herein or implied herein shall at any time be construed as to create the relationship of employer and employee, partnership, principal and agent, or joint venture between the District and the Contractor.

5.15 SUBCONTRACTING:

The Contractor may not assign this Contract or subcontract to another party for performance of the terms and conditions hereof without the written consent of the County, which shall not be unreasonably withheld. All correspondence authorizing subcontracting must reference the Proposal Serial Number and identify the job project.

5.16 AMENDMENTS:

All amendments to this Contract shall be in writing and approved/signed by both parties. Maricopa County Office of Procurement Services shall be responsible for approving all amendments for Maricopa County.

5.17 ACCESS TO AND RETENTION OF RECORDS FOR THE PURPOSE OF AUDIT AND/OR OTHER REVIEW:

5.17.1 In accordance with section MCI 367 of the Maricopa County Procurement Code the Contractor agrees to retain all books, records, accounts, statements, reports, files, and other records and back-up documentation relevant to this Contract for six (6) years after final payment or until after the resolution of any audit questions which could be more than six (6) years, whichever is latest. The County, Federal or State auditors and any other persons duly authorized by the Department shall have full access to, and the right to examine, copy and make use of, any and all said materials.

5.17.2 If the Contractor's books, records , accounts, statements, reports, files, and other records and back-up documentation relevant to this Contract are not sufficient to support and document that requested services were provided, the Contractor shall reimburse Maricopa County for the services not so adequately supported and documented.

5.18 AUDIT DISALLOWANCES:

If at any time, County determines that a cost for which payment has been made is a disallowed cost, such as overpayment, County shall notify the Contractor in writing of the disallowance. County shall also state the means of correction, which may be but shall not be limited to adjustment of any future claim submitted by the Contractor by the amount of the disallowance, or to require repayment of the disallowed amount by the Contractor.

5.19 ALTERNATIVE DISPUTE RESOLUTION:

5.19.1 After the exhaustion of the administrative remedies provided in the Maricopa County Procurement Code, any contract dispute in this matter is subject to compulsory arbitration. Provided the parties participate in the arbitration in good faith, such arbitration is not binding and the parties are entitled to pursue the matter in state or federal court sitting in Maricopa County for a de novo determination on the law and facts. If the parties cannot agree on an arbitrator, each party will designate an arbitrator and those two arbitrators will agree on a third arbitrator. The three arbitrators will then serve as a panel to consider the arbitration. The parties will be equally responsible for the compensation for the arbitrator(s). The hearing, evidence, and procedure will be in accordance with Rule 74 of the Arizona Rules of Civil Procedure. Within ten (10) days of the completion of the hearing the arbitrator(s) shall:

5.19.1.1 Render a decision;

5.19.1.2 Notify the parties that the exhibits are available for retrieval; and

5.19.1.3 Notify the parties of the decision in writing (a letter to the parties or their counsel shall suffice).

5.19.2 Within ten (10) days of the notice of decision, either party may submit to the arbitrator(s) a proposed form of award or other final disposition, including any form of award for attorneys' fees and costs. Within five (5) days of receipt of the foregoing, the opposing party may file objections. Within ten (10) days of receipt of any objections, the arbitrator(s) shall pass upon the objections and prepare a signed award or other final disposition and mail copies to all parties or their counsel.

5.19.3 Any party which has appeared and participated in good faith in the arbitration proceedings may appeal from the award or other final disposition by filing an action in the state or federal court sitting in Maricopa County within twenty (20) days after date of the award or other final disposition. Unless such action is dismissed for failure to prosecute, such action will make the award or other final disposition of the arbitrator(s) a nullity.

5.20 SEVERABILITY:

The invalidity, in whole or in part, of any provision of this Contract shall not void or affect the validity of any other provision of this Contract.

5.21 RIGHTS IN DATA:

The County shall own have the use of all data and reports resulting from this Contract without additional cost or other restriction except as provided by law. Each party shall supply to the other party, upon request, any available information that is relevant to this Contract and to the performance hereunder.

5.22 INTEGRATION:

This Contract represents the entire and integrated agreement between the parties and supersedes all prior negotiations, proposals, communications, understandings, representations, or agreements, whether oral or written, express or implied.

5.23 VERIFICATION REGARDING COMPLIANCE WITH ARIZONA REVISED STATUTES §41-4401 AND FEDERAL IMMIGRATION LAWS AND REGULATIONS:

5.23.1 By entering into the Contract, the Contractor warrants compliance with the Immigration and Nationality Act (INA using e-verify) and all other federal immigration laws and regulations related to the immigration status of its employees and A.R.S. §23-214(A). The contractor shall obtain statements from its subcontractors certifying compliance and shall furnish the statements to the Procurement Officer upon request. These warranties shall remain in effect through the term of the Contract. The Contractor and its subcontractors shall also maintain Employment Eligibility Verification forms (I-9) as required by the Immigration Reform and Control Act of 1986, as amended from time to time, for all employees performing work under the Contract and verify employee compliance using the E-verify system and shall keep a record of the verification for the duration of the employee's employment or at least three years, whichever is longer. I-9 forms are available for download at USCIS.GOV.

5.23.2 The County retains the legal right to inspect contractor and subcontractor employee documents performing work under this Contract to verify compliance with paragraph 5.23.1 of this Section. Contractor and subcontractor shall be given reasonable notice of the County's intent to inspect and shall make the documents available at the time and date specified. Should the County suspect or find that the Contractor or any of its subcontractors are not in compliance, the County will consider this a material breach of the contract and may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

5.24 VERIFICATION REGARDING COMPLIANCE WITH ARIZONA REVISED STATUTES §§35-391.06 AND 35-393.06 BUSINESS RELATIONS WITH SUDAN AND IRAN:

5.24.1 By entering into the Contract, the Contractor certifies it does not have scrutinized business operations in Sudan or Iran. The contractor shall obtain statements from its subcontractors certifying compliance and shall furnish the statements to the Procurement Officer upon request. These warranties shall remain in effect through the term of the Contract.

5.24.2 The County may request verification of compliance for any contractor or subcontractor performing work under the Contract. Should the County suspect or find that the Contractor or any of its subcontractors are not in compliance, the County may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of

the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

5.25 CONTRACTOR LICENSE REQUIREMENT:

5.25.1 The Respondent shall procure all permits, insurance, licenses and pay the charges and fees necessary and incidental to the lawful conduct of his/her business, and as necessary complete any required certification requirements, required by any and all governmental or non-governmental entities as mandated to maintain compliance with and in good standing for all permits and/or licenses. The Respondent shall keep fully informed of existing and future trade or industry requirements, Federal, State and Local laws, ordinances, and regulations which in any manner affect the fulfillment of a Contract and shall comply with the same. Contractor shall immediately notify both Office of Procurement Services and the using agency of any and all changes concerning permits, insurance or licenses.

5.25.2 Respondents furnishing finished products, materials or articles of merchandise that will require installation or attachment as part of the Contract, shall possess any licenses required. A Respondent is not relieved of its obligation to posses the required licenses by subcontracting of the labor portion of the Contract. Respondents are advised to contact the Arizona Registrar of Contractors, Chief of Licensing, at (602) 542-1525 to ascertain licensing requirements for a particular contract. Respondents shall identify which license(s), if any, the Registrar of Contractors requires for performance of the Contract.

5.26 CERTIFICATION REGARDING DEBARMENT AND SUSPENSION

5.26.1 The undersigned (authorized official signing for the Contractor) certifies to the best of his or her knowledge and belief, that the Contractor, defined as the primary participant in accordance with 45 CFR Part 76, and its principals:

5.26.1.1 are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal Department or agency;

5.26.1.2 have not within 3-year period preceding this Contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statues or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

5.26.1.3 are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and

5.26.1.4 have not within a 3-year period preceding this Contract had one or more public transaction (Federal, State or local) terminated for cause of default.

5.26.2 Should the Contractor not be able to provide this certification, an explanation as to why should be attached to the Contact.

5.26.3 The Contractor agrees to include, without modification, this clause in all lower tier covered transactions (i.e. transactions with subcontractors) and in all solicitations for lower tier covered transactions related to this Contract.

5.27 PRICES:

Contractor warrants that prices extended to County under this Contract are no higher than those paid by any other customer under similar terms and circumstances for these or similar services."

5.28 GOVERNING LAW:

This Contract shall be governed by the laws of the state of Arizona. Venue for any actions or lawsuits involving this Contract will be in Maricopa County Superior Court or in the United States District Court for the District of Arizona, sitting in Phoenix, Arizona

5.29 ORDER OF PRECEDENCE:

In the event of a conflict in the provisions of this Contract and Contractor's license agreement, if applicable, the terms of this Contract shall prevail.

5.30 INFLUENCE

As prescribed in MC1-1202 of the Maricopa County Procurement Code, any effort to influence an employee or agent to breach the Maricopa County Ethical Code of Conduct or any ethical conduct, may be grounds for Disbarment or Suspension under MC1-902.
An attempt to influence includes, but is not limited to:

5.30.1 A Person offering or providing a gratuity, gift, tip, present, donation, money, entertainment or educational passes or tickets, or any type valuable contribution or subsidy,

5.30.2 That is offered or given with the intent to influence a decision, obtain a contract, garner favorable treatment, or gain favorable consideration of any kind.

If a Person attempts to influence any employee or agent of Maricopa County, the Chief Procurement Officer, or his designee, reserves the right to seek any remedy provided by the Maricopa County Procurement Code, any remedy in equity or in the law, or any remedy provided by this contract.

5.31 INCORPORATION OF DOCUMENTS:

The following are to be attached to and made part of this Contract:

5.31.1 Exhibit A, Pricing;
5.31.2 Exhibit B, Project Staffing Plan
5.31.3 Exhibit C, Scope of Work;
5.31.4 Exhibit D Vendor Response
5.31.5 Exhibit E Vendor BAFO
5.31.6 Exhibit F, Office of Procurement Services Contractor Travel and Per Diem Policy.

EXHIBIT B
PROJECT STAFFING PLAN

Phase 1

Deliverable	Personnel Name								
	Bryan Gillgrass	Lori Wolfe	Richard Kai	Alison Breckenridge	Jerry Harper	George Roundry	Eric Tingom	MJ deForte	Total Hours
DELIVERABLE #1: Project plan and updates	4	20	3	0	0	3	0	20	50
DELIVERABLE #2: Communication plan	2	8	8	0	0	12	7	0	37
DELIVERABLE #3: Weekly status reports (36)	0	112	16	0	0	18	18	30	194
DELIVERABLE #4: Monthly issues reports (9)	9	72	8	0	5	9	9	48	160
DELIVERABLE #5: Documentation of user/stakeholder Interviews	16	220	220	0	0	120	200	220	996
DELIVERABLE #6: Workflow diagrams and related analytical documents	0	180	220	0	0	80	60	200	740
DELIVERABLE #7: Report describing the "as is" state of MCSO detention systems	16	80	100	0	0	80	60	140	476
DELIVERABLE #8: Requirements (functional specifications) for the JMS replacement RFP	25	240	200	0	40	120	120	240	985
DELIVERABLE #9: Conceptual design for the new JMS	16	80	72	0	80	120	100	120	588
DELIVERABLE #10: Initial scope of work for the JMS replacement RFP	8	80	24	0	15	80	62	80	349
Total Hours	96	1092	871	0	140	642	636	1098	4575

Phase 2

Deliverable	Personnel Name								
	Bryan Gillgrass	Lori Wolfe	Richard Kai	Alison Breckenridge	Jerry Harper	George Roundry	Eric Tingom	MJ deForte	Total Hours
DELIVERABLE #1: Project plan and updates	6	24	0	0	0	3	0	24	57
DELIVERABLE #2: Weekly status reports (32)	0	64	0	0	0	16	16	32	128
DELIVERABLE #3: Monthly issues reports (8)	8	72	0	0	0	8	8	8	104
DELIVERABLE #4: Communication plan	0	8	0	0	0	4	4	8	24
DELIVERABLE #5: Finalized RFP for replacement of JMS and related detention systems	50	500	0	0	60	160	150	500	1420
DELIVERABLE #6: Consensus of the Evaluation team for selection of the JMS vendor	20	320	0	0	40	80	80	220	760
Total Hours	84	988	0	0	100	271	258	792	2493

Phase 3*

Deliverable	Personnel Name								
	Bryan Gillgrass	Lori Wolfe	Richard Kai	Alison Breckenridge	Jerry Harper	George Roundry	Eric Tingom	MJ deForte	Total Hours
DELIVERABLE #1: Project plan and updates	24	160	0	180	0	4	0	160	528
DELIVERABLE #2: Weekly status reports (96)	0	180	0	90	0	48	48	180	546
DELIVERABLE #3: Monthly issues reports (24)	24	120	0	48	0	48	48	80	368
DELIVERABLE #4: Communication plan	4	48	0	24	0	0	16	48	140
DELIVERABLE #5: Fit/Gap analysis report	16	140	0	40	120	140	140	140	736
DELIVERABLE #6: Proposed architecture for the JMS implementation	24	72	0	0	0	60	40	120	316
DELIVERABLE #7: Set-up of the system environment, including test and production systems	16	180	0	0	0	50	40	180	466
DELIVERABLE #8: System training for the project team	12	120	0	0	16	70	60	140	418
DELIVERABLE #9: Written plan for data conversion	16	160	0	0	0	70	60	160	466
DELIVERABLE #10: Written plan for data interfaces	16	120	0	0	0	70	60	120	386
DELIVERABLE #11: Written plan for system testing	16	180	0	0	0	70	70	180	516
DELIVERABLE #12: Completion of system testing activities, including resolution of issues	8	140	0	0	0	80	80	180	488
DELIVERABLE #13: Written cutover ("go-live") plan, including contingency provisions	8	120	0	24	12	80	80	120	444
DELIVERABLE #14: System and user documentation	8	120	0	24	0	60	60	120	392

DELIVERABLE #15: Written procedures for post go-live support	8	160	0	0	0	80	80	140	468
DELIVERABLE #16: Just-in-time user training	0	120	0	0	12	60	60	140	392
DELIVERABLE #17: Successful cutover to the new jail management system	8	120	0	0	0	80	80	140	428
DELIVERABLE #18: Post go-live project review meeting and project closeout	8	60	0	0	4	8	8	64	152
Total Hours	216	2320	0	430	164	1078	1030	2412	7650

***The County reserves the right to determine if Phase 3will be performed by the Contractor or the County.**

EXHIBIT C
SCOPE OF WORK

1.0 INTENT**:**

Consulting services will be provided on a firm, fixed pricing basis and are required for three distinct phases of the JMS replacement project:

(1) Identifying and defining business, technical, and integration requirements for the new system;
(2) Developing a Request For Proposals (RFP) and assisting MCSO and County staff with the evaluation of proposals and vendor selection; and
(3) Overseeing implementation of the new jail management system, from procurement through final acceptance, including turnover to support personnel and project close-out.

The County reserves the right to determine if Phase 3 will be performed by the Contractor or the County.

The primary focus of this project is to replace the functionality in the existing JMS and two other systems, Pre-Booking and the Inmate Funds/Canteen System (IFCS), which interface with the current JMS. Additionally, there are a number of smaller applications and databases (e.g., in Excel or Access) used throughout the Sheriff's Office that will need to be reviewed for requirements and potential replacement as part of this project.

Key objectives and goals for the JMS replacement project are to:

- Replace the current JMS and related detention management software applications with a new commercial off-the-shelf (COTS) system that meets or exceeds needs of the Sheriff's Office.
- Deliver the new system on time and within budget.
- Provide documentation and training on the new system and technologies so that MCSO is left with a technologically sound solution that allows for future enhancements and that can be easily supported by in-house staff.

2.0 BACKGROUND INFORMATION:

2.1 GENERAL OVERVIEW:

Maricopa County measures 9,226 square miles and is comprised of urban and rural areas in and around metropolitan Phoenix. Geographically dispersed, the County is the 15th largest U.S. County by area. The County's population grew by 24% from 2000-2010, and now exceeds 3.8 million residents. The Sheriff's Office is one of the largest departments in Maricopa County, employing just over 26% of the County's 13,577 employees, and representing about 12.5% of the County's $2.33 billion appropriated expenditures budget in Fiscal Year (FY) 2012.

The Maricopa County Sheriff is an elected official whose statutory responsibilities include law enforcement activities and the care and custody of persons booked into jail. MCSO has 3,557 positions budgeted in FY 2012, including 2,125 Detention, 733 Sworn, and 699 Civilian personnel. In addition, the Office oversees the activities of more than 179 reserve deputies, 3,200 posse members, and 500 active volunteers who work in the jails.

The mission of the Sheriff's Office is to enforce laws, deter criminal activity, protect life and property, maintain order, and operate a safe, constitutional jail system (see Exhibit 6). To accomplish this mission, the Office is organized into bureaus, divisions, sections, and units. Each unit is responsible for a segment of business activity within the following major areas:

- Enforcement – Dispatch, Patrol, Arrest, Tactical Operations, Aviation, Incident Command
- Investigative – General and Special Investigations, Crime Lab, Civil Process, Forfeiture, Pawnshop, Property Room

- Custody Management – Intake, Detention Management, Release, Facilities Management
- Inmate Services – Addictive Recovery, Educational Services, Mandated Inmate Services, Meals, Medical
- Cost Abatement – External and Internal Inmate Work Programs, Gleaning, Inmate Special Services
- Administrative Services – Finance, Budget, Human Resources, Procurement, Risk Management
- Centralized MCSO Operations – Training, Staffing, Warehouse, Fleet Management, Legal Services, Records Management, Professional Standards
- Information Technology – Applications Development, Data Center, Desktop Support, Communications, Help Desk
- Community Service – Public Interaction, Community Outreach, Volunteer Services

The Sheriff's Office runs the fourth largest jail system in the nation, with 8,000-10,000 inmates housed at any given time. During 2011, just under 108,000 persons were booked into MCSO jails, by more than 130 different criminal justice agencies. Releases averaged just over 8,950 per month in 2011, equating to almost 300 per day.

The Sheriff's Office currently operates five main jail facilities – 4th Avenue, Lower Buckeye, Estrella, Towers and Durango. In addition, "Tent Cities" are located at the Durango complex, housing fully sentenced persons. Satellite jail facilities in Mesa, Dysart & Bell, and Avondale also hold prisoners on a short-term basis. Most cities within Maricopa County have contracted with the Sheriff's Office to house prisoners at a fixed per diem rate.

Several Sheriff's Office divisions provide support services specifically for the detention area. These divisions manage activities such as food preparation, laundry, facilities maintenance, inmate transportation, and canteen operations.

Contractor shall report to and will work under the direction of the MCSO Technology Bureau, acting on behalf of a governance board and all stakeholders, throughout all phases of the JMS replacement project. An MCSO project leader will be assigned to aid the Contractor in coordinating project activities for the duration of the project.

3.0 SCOPE OF WORK:

3.1 ALL PHASES – PROJECT MANAGEMENT SERVICES:

3.1.1 The Contractor shall manage the project and develop a detailed project plan with tasks, sub-tasks, dependencies, key milestones and timelines (estimated durations) describing the work to be accomplished in accordance with this contract. The project plan must also include specific Contractor, MCSO, and/or subcontractor resource assignments by name and/or job title. The project plan will track progress of the project, and will be updated regularly as changes occur and/or as required by MCSO.

3.1.2 The Contractor shall develop a communications plan for managing information flow in the project.

3.1.3 The Contractor shall provide weekly status updates verbally and in the form of a written report. The final format and content of the report shall be approved by the MCSO project leader. At minimum, the report should include, but not be limited to the following:

3.1.3.1 Work completed during the reporting period – describing tasks accomplished within the reporting period and the status of associated work products.

3.1.3.2 Work in progress – describing activities currently underway.

3.1.3.3 Scheduled status – comparing completed tasks and work products against those scheduled to date, and include explanations of schedule variances and recommendations for mitigating the variances.

3.1.3.4 Work to be completed – describing activities and deliverables contained in the project work plan which are expected to be completed within the next reporting period.

3.1.3.5 Issues, risks, problems, and resolutions – highlighting key issues and concerns which may need to be prioritized and addressed by the Contractor and the Sheriff's Office. Resolutions to previous problems will be reported, as well as mitigation recommendations to new problems and risks.

3.1.4 The Contractor shall provide a monthly issues report, in writing, with an updated status on major issues affecting the JMS replacement project. The final format and content of the issues report shall be approved by the MCSO project leader. At minimum, the report should include, but not be limited to the following:

3.1.4.1 Description of the issue – explaining each major issue in detail, including causes, why the issue is deemed critical, who is affected, and associated risks if the issue is not resolved.

3.1.4.2 Options – explaining alternatives to resolve or overcome the issue, including an analysis of advantages/disadvantages of the alternatives, as well as estimated costs and staffing resources that would be required to proceed with each alternative.

3.1.4.3 Recommendations – proposing an optimal solution with an explanation of why the option is endorsed.

3.1.5 The Contractor shall create and maintain a document library that will provide a comprehensive audit history of services provided and work product developed within the scope of the JMS replacement project. The document library will:

3.1.5.1 Include reports, presentations, spreadsheets, databases, project plans, workflow and other diagrams, photographs, website content, meeting agendas and summaries, relevant emails, memos, and all other documents relating to the project.

3.1.5.2 Be hosted on an MCSO system. All project-related work products, materials and correspondence, including all items in the document library, are and shall remain the exclusive property of MCSO.

3.1.6 The Contractor shall schedule and facilitate regular meetings of the project team, including kick-off and project close-out meetings, as needed or as directed by the MCSO project leader. The Contractor shall:

3.1.6.1 Prepare meeting agendas.

3.1.6.2 Ensure meeting notes or summaries are prepared and distributed to participants and/or project team members as appropriate.

3.1.6.3 Track action items, including person(s) assigned, planned and actual completions, status/comments, etc.

3.1.7 The Contractor shall provide presentations and/or reports for management and/or the governance board as requested by MCSO.

3.1.8 The Contractor shall manage all activities of the project team. As needed, and in conjunction with the MCSO project leader, Contractor must promptly facilitate problem

solving and conflict resolution activities, including escalation to the governance board and/or executive management when required.

3.2 PHASE 1 – REQUIREMENTS:
Estimated Duration: 6- 9 Months

3.2.1 The Contractor will be responsible for providing expert services, advice, and assistance to the Sheriff's Office for the development of the necessary technical requirements which include the scope of work for acquisition of a new jail management system, at a level of specificity sufficient to enable bidders to develop a detailed work plan that responds to the RFP requirements.

3.2.2 The Contractor, through MCSO, will have access to and the use of stakeholder groups to supplement its resources in producing content for the RFP. Reliance by the Contractor on MCSO resources shall not prevent Contractor self-reliance, as the Contractor is responsible for producing the strategies and the RFP's content. At a minimum, the following shall be performed by the Contractor:

3.2.2.1 Identify and communicate with all user groups and stakeholders including other criminal justice agencies within Maricopa County who will be affected by the project.

3.2.2.2 Request, review, and analyze relevant data, including information concerning replacement of the current JMS, Pre-Booking, and IFCS systems, as well as any other internal applications or databases used in detention operations.

3.2.2.3 Interview subject matter experts in person, over the phone, or via email.

3.2.2.4 Determine the "as-is" state of existing detention related systems for a complete understanding of Sheriff's Office requirements and needs for replacement.

3.2.2.5 Gather and incorporate inputs from subject matter experts (SMEs) into the RFP requirements.

3.2.2.6 Develop an initial scope of work for the RFP to replace existing applications, including any recommended enhancements, interface and data conversion requirements, etc.

3.2.2.7 Advise MCSO of best practices for a successful procurement and to mitigate issues throughout the procurement process.

3.2.3 The Contractor must identify and incorporate requirements for all functional areas and/or work groups listed below in the scope of the JMS replacement project, as well as any others that may be identified during the requirements gathering process:

3.2.3.1 Pre-Booking – including MCSO and outside law enforcements agencies (Phoenix PD, et.al. that are representative for requirements and modes of system access)
3.2.3.2 Intake – including 4th Avenue Central Intake and Self-Surrenders at Lower Buckeye Jail (LBJ)
3.2.3.3 Jail Facilities – including 4th Avenue, LBJ, Estrella, Durango, Towers, Tents, Southeast (Mesa), Bell & Dysart, and Avondale
3.2.3.4 Housing
3.2.3.5 Classification
3.2.3.6 Records & ID
3.2.3.7 Bonds & Fines (SIMS)
3.2.3.8 Warrants and Holds
3.2.3.9 Immigration
3.2.3.10 Fingerprint Identification
3.2.3.11 Mug Shots

3.2.3.12 Facial Recognition
3.2.3.13 Medical Services
3.2.3.14 Inmate Appointments – including medical, court, other
3.2.3.15 Security & Transport
3.2.3.16 Inmate Property Management
3.2.3.17 Billings (to other agencies)
3.2.3.18 Budget Division – including Managing for Results (MfR)
3.2.3.19 Financial Services Division
3.2.3.20 Inmate Funds Accounting
3.2.3.21 Canteen – including order processing and inventory management
3.2.3.22 Inmate Programs
3.2.3.23 Chaplains / Religious Services
3.2.3.24 Inmate Legal Services
3.2.3.25 Inmate Library
3.2.3.26 Inmate Grievances
3.2.3.27 Hearings Unit
3.2.3.28 Inmate Telephone System – including IVR
3.2.3.29 Inmate Deposits (Kiosk, Web, IVR)
3.2.3.30 Jail Intel Unit – including gang management and security threat groups
3.2.3.31 Jail Crimes
3.2.3.32 Visitation
3.2.3.33 Work Release/Work Furlough Programs
3.2.3.34 Workbox Unit – including WIMP application
3.2.3.35 Sentence Calculations
3.2.3.36 Inmate Releases
3.2.3.37 Victim Notification Unit
3.2.3.38 MASH Unit
3.2.3.39 Chain Gang Unit
3.2.3.40 Jail Statistics
3.2.3.41 Internal Affairs (audit logs to investigate policy violations)
3.2.3.42 Institutional Services – including Food Services, Laundry, Distribution Services
3.2.3.43 Compliance Unit (e.g., Graves -vs- Arpaio mandates)
3.2.3.44 Academy Training
3.2.3.45 Technology Bureau – including applications development and data center personnel
3.2.3.46 System Security Officer
3.2.3.47 Extraditions
3.2.3.48 Child support, DES (welfare or unemployment), SSI, restitution, and other payments made to or by MCSO Inmates
3.2.3.49 CopLink – JMS data source
3.2.3.50 MCSO governance board and/or executive management

3.2.4 Additionally, the Contractor must gather requirements from the following agencies outside of MCSO that process, produce, or consume data for or from Pre-Booking, JMS, IFCS and/or other Sheriff's Office detention systems:

3.2.4.1 ICJIS
3.2.4.2 Correctional Health Services
3.2.4.3 County Attorney's Office
3.2.4.4 Clerk of the Superior Court
3.2.4.5 Superior Court / Trial Courts – Criminal Court Administration
3.2.4.6 Juvenile Courts / Juvenile Probation / Juvenile Detention
3.2.4.7 Adult Probation Office
3.2.4.8 Public Defender
3.2.4.9 Indigent Representation
3.2.4.10 Phoenix Police Department – Records & ID (PACE Unit)
3.2.4.11 County Manager's Office

3.2.5 Contractor must use knowledge of industry best practices, available technologies, and future trends to document requirements that can enhance and improve detention operations, not just replace functionality as it exists today.

3.2.6 Phase 1 Contractor deliverables include the following, which must be available to project team members in the MCSO documentation library:

3.2.6.1 Project plan and updates.
3.2.6.2 Communication plan.
3.2.6.3 Weekly status reports.
3.2.6.4 Monthly issues reports.
3.2.6.5 Documentation of user/stakeholder interviews.
3.2.6.6 Workflow diagrams and related analytical documents.
3.2.6.7 Report describing the "as is" state of MCSO detention systems.
3.2.6.8 Requirements (functional specifications) for the JMS replacement RFP.
3.2.6.9 Conceptual design for the new JMS.
3.2.6.10 Initial scope of work for the JMS replacement RFP.

3.3 PHASE 2 – RFP & VENDOR SELECTION:
Estimated Duration: 6 – 8 Months

3.3.1 The Contractor will participate in the RFP development for the new jail management system. The Contractor shall provide recommendations encompassing strategies that include governance, privacy and security, technical operations, legal, and finance. The Contractor shall lead development of RFP sections including but not limited to the scope of work, related terms and conditions, instructions, payment provisions, and price structure for the development of the RFP. The Contractor shall provide advice and work products that foster broad based competition in compliance with competitive source selection provisions of the Maricopa County Procurement Code; however, knowledge of the Procurement Code is not a required skill set.

3.3.2 The Contractor will provide assistance during the competitive RFP process for the new JMS, including assistance in answering questions in relation to the requirements of the RFP; assistance in the evaluation process; and assistance with the selection of the most advantageous vendor(s) for the Sheriff's Office based on the evaluation factors set forth in the RFP. In addition, the Contractor will provide technical support through the evaluation of offers, oral presentations, contract negotiation, contract execution and project implementation.

3.3.3 The Contractor shall possess the technical knowledge and resources necessary to understand, articulate, and express in written form the requirements of the RFP at a level appropriate for a procurement effort.

3.3.4 Requirements for preparation of the Scope of Work for the new jail management system RFP include:

3.3.4.1 Structuring the scope of work in accordance with MCSO objectives and requirements.

3.3.4.2 Structuring the scope of work to allow MCSO to monitor the vendor's progress during the contract to detect problems and/or delays before they become critical.

3.3.5 The scope of work shall include detailed information as follows:

3.3.5.1 A clear and concise description of the work to be performed, services to be provided, problems to be solved, and the goals and objectives to be met.

3.3.5.2 A description, in realistic terms, of what the vendor is expected to accomplish, including the desired approach to the specific functions, tasks, and activities that must be performed.

3.3.5.3 Business requirements.

3.3.5.4 Technical requirements.

3.3.5.5 Legal limitations.

3.3.5.6 Establish performance timelines, completion dates, and methods of measurement.

3.3.5.7 A description of the items, products, and results to be delivered and method of validation.

3.3.5.8 The extent and nature of the assistance and cooperation from MCSO that will be available to the vendor.

3.3.5.9 Instructions that describe the format that the vendor must follow and the elements that must be addressed, including proposal evaluation and vendor selection criteria.

3.3.6 The Contractor shall provide advice regarding the following sections of the RFP, or an equivalent or recommended alternative that achieves the same goal:

3.3.6.1 Introduction and Review of Requirements.
3.3.6.2 Proposed Solution.
3.3.6.3 Administrative Requirements.
3.3.6.4 Scope of Work Requirements.
3.3.6.5 Cost approach that includes type or method of payment for services provided.
3.3.6.6 Proposal format.
3.3.6.7 Interview and/or demonstration.
3.3.6.8 Contract terms and conditions appropriate or unique to the scope of work.
3.3.6.9 Phased implementation approach for the new jail management system.

3.3.7 The Contractor shall provide updates to and advice regarding the RFP drafts throughout the RFP development process for review by MCSO as follows:

3.3.7.1 Upon request by the Sheriff's Office.
3.3.7.2 Upon completion of each draft RFP section.
3.3.7.3 Updated draft sections based on MCSO staff review comments.
3.3.7.4 Provide revisions no later than as required by MCSO.
3.3.7.5 Backup and maintain the project documentation library as required, providing a full record of requirements documentation from initial through final iterations.

3.3.8 Evaluation Team, Approach, and Procedures – Develop the proposal evaluation approach, including development of an offer evaluation instrument, recommendation of potential evaluation team members in conjunction with the Sheriff's Office, and development of evaluation procedures for approval by MCSO and the County's Office of Procurement Services (OPS). As directed by MCSO, the Contractor shall:

3.3.8.1 Assist the Sheriff's Office in identifying evaluation team members. Evaluation team members must not have a conflict of interest.

3.3.8.2 Recommend and utilize evaluation best practices.

3.3.8.3 Develop procedures and an approach for evaluation committee proposal review.

3.3.8.4 Define and document the process the evaluation team will use to score the proposal utilizing criteria defined in the RFP.

3.3.8.5 Develop the proposal evaluation instrument.

3.3.8.6 As determined necessary by the Sheriff's Office, provide technical advice to help evaluation team members in reaching a consensus.

3.3.8.7 Participate in training of the evaluation team members on the evaluation instrument framework and the process. Assuming a maximum of 8-10 evaluation team members, Contractor shall provide a rationale for the recommended number of evaluation team members.

3.3.9 Support for Procurement – Provide advice and assistance and prepare work products as directed by the Sheriff's Office that include the following:

3.3.9.1 Response to bidder questions/inquiries.

3.3.9.2 Identify and meet with subject matter experts to develop response(s).

3.3.9.3 Document response(s) in a format acceptable to the Sheriff's Office and the Office of Procurement Services.

3.3.9.4 Provide draft response document(s) to the Sheriff's Office for review. Contractor shall continue making revisions as requested until the response document is acceptable to the Sheriff's Office.

3.3.9.5 Provide the final response to MCSO no later than as required by MCSO.

3.3.9.6 Participate in the initial proposal evaluations and confidential discussions as requested.

3.3.9.7 Provide technical support to the evaluation committee that will review and evaluate the proposals as part of the selection process.

3.3.9.8 Participate in evaluation discussions and negotiations.

3.3.10 Upon release of the RFP by the County, provide support throughout the procurement process leading up to and including contract award. At a minimum, the following shall be provided:

3.3.10.1 Update and modify procurement documents upon request from MCSO and in conjunction with OPS.

3.3.10.2 Throughout the procurement process, make available to the procurement team, in a timely manner, staff with the technical expertise and experience to help the procurement evaluation committee make decisions related to the evaluation of offers.

3.3.10.3 Respond to Bid Protests – In the event of a bid protest, the Contractor may be involved in preparing documents in response to a bidder's protest or appeal and participating in any meetings. Contractor may be required to attend and testify at any hearings to help resolve the protest or appeal. The Contractor shall work in conjunction with MCSO and the Maricopa County Office of Procurement Services on these issues.

3.3.11 Phase 2 Contractor deliverables include the following, which must be available to project team members in the MCSO documentation library:

3.3.11.1 Project plan and updates.
3.3.11.2 Weekly status reports.
3.3.11.3 Monthly issues reports.
3.3.11.4 Communication plan.
3.3.11.5 Finalized RFP for replacement of JMS and related detention systems.

3.3.11.6 Consensus of the Evaluation team for selection of the JMS vendor.

3.4 PHASE 3 – NEW JMS IMPLEMENTATION:
Estimated Duration: 18-24 Months

3.4.1 The Contractor shall provide leadership and advice for the project team throughout the implementation phase to ensure that MCSO's goals, objectives, and operational requirements are met, industry best practices are incorporated into the business solution, and the project is an overall success.

3.4.2 The Contractor must lead a "fit/gap" analysis, to be performed by the successful JMS Vendor, which will compare functionality of the JMS Vendor's solution against MCSO's requirements to identify any gaps that will need to be addressed during project implementation. The Contractor shall prepare a comprehensive written report describing gaps and proposed resolutions or workarounds.

3.4.3 The Contractor shall propose an appropriate IT architecture for the new system. When approved by MCSO, the Contractor will coordinate procurement activities with MCSO personnel, and oversee set-up of the system environment, including test and production systems.

3.4.4 The Contractor must obtain advance approval from the MCSO project leader for any proposed/recommended systems or tools to be used by the project team, including software development tools, issues tracking systems, desktop applications (e.g., Microsoft Office Suite), etc.

3.4.5 The Contractor shall ensure that adequate system training is provided to project team members such that the project team has the knowledge and skills necessary to successfully navigate and utilize the new jail management system during development and implementation.

3.4.6 Under the direction of the Contractor, the project team will perform system set-up activities such as the population of system tables, user configurations, user role definitions and system permissions, preparation of documentation, system options configurations, etc.

3.4.7 The Contractor shall lead the project team in all data conversion activities, including development of a written data conversion plan, decisions regarding which data to convert into the new JMS, data cleanup, data staging, and the actual conversion process.

3.4.8 The Contractor shall lead the project team in all data integration activities, including development of a written data integration plan, decisions regarding transfer protocols and data elements from the new JMS to be fed to external systems, as well as the actual development and implementation of data feeds.

3.4.9 The Contractor shall lead the JMS Vendor and the MCSO project team in development of detailed test plans, including unit, integration, and load testing, as well as for interfaces and data conversion processes.

3.4.10 The Contractor shall lead testing activities and ensure appropriate corrections are implemented to resolve any issues discovered.

3.4.11 In conjunction with the MCSO project leader and the project team, the Contractor shall determine roll-out strategies, including a cutover ("go-live") plan. The cutover plan must include contingency provisions in the event of an initially unsuccessful cutover. The Contractor shall also ensure that the cutover plan is communicated to MCSO staff and other agencies in a timely manner.

3.4.12 As directed by the MCSO project leader, the Contractor shall ensure appropriate system and user documentation is in place, including such materials as routine system maintenance and backup/restore procedures.

3.4.13 The Contractor shall establish a plan for post go-live support. The plan shall include procedures for MCSO's Help Desk, server administration, applications support, and desktop support teams. The Contractor shall ensure that MCSO personnel have acquired the necessary knowledge and skills required to successfully support the new JMS on an on-going basis.

3.4.14 The Contractor shall ensure all JMS users are trained such that they have acquired the knowledge and skills required to successfully navigate and utilize the system and successfully perform the functions of their position. The training must be provided on a "just-in-time" schedule so that knowledge transfer will not be lost prior to system cutover.

3.4.15 The Contractor shall lead the project team during cutover to the new JMS ("go-live"), including execution of any contingency plans that may be required until cutover is successful.

3.4.16 The Contractor shall lead the project team in the resolution of post go-live system issues.

3.4.17 All work product documents pertaining to the project must be available to project team members throughout the duration of the implementation phase. The Contractor shall ensure the MCSO documentation library for the project is organized and complete prior to project closeout.

3.4.18 The Contractor shall attend a post go-live project review meeting to be facilitated by the MCSO project lead. The purpose of the meeting will be to discuss overall implementation of the JMS replacement project, including:

3.4.18.1 Aspects of the project that were successful.
3.4.18.2 Aspects of the project that could/should have been done differently.
3.4.18.3 Lessons to be learned for future projects.
3.4.18.4 Any remaining project closeout issues.

3.4.19 Phase 3 Contractor deliverables include the following, which must be available to the project team in the MCSO documentation library:

3.4.19.1 Project plan and updates.
3.4.19.2 Weekly status reports.
3.4.19.3 Monthly issues reports.
3.4.19.4 Communication plan.
3.4.19.5 Fit/Gap analysis report.
3.4.19.6 Proposed architecture for the JMS implementation.
3.4.19.7 Set-up of the system environment, including test and production systems.
3.4.19.8 System training for the project team.
3.4.19.9 Written plan for data conversion.
3.4.19.10 Written plan for data interfaces.
3.4.19.11 Written plan for system testing.
3.4.19.12 Completion of system testing activities, including resolution of issues.
3.4.19.13 Written cutover ("go-live") plan, including contingency provisions.
3.4.19.14 System and user documentation.
3.4.19.15 Written procedures for post go-live support.
3.4.19.16 Just-in-time user training.
3.4.19.17 Successful cutover to the new jail management system.
3.4.19.18 Post go-live project review meeting and project closeout.

3.5 SITE LOCATIONS, WORKSPACE, AND EQUIPMENT:

3.5.1 The scope of work described in this contract shall be performed at an MCSO downtown Phoenix office location for meetings and implementation activities. All other administrative tasks can be performed at the Contractor's own office and/or any office location designated by MCSO or the County.

3.5.2 During the course of the project, MCSO shall provide the Contractor's personnel with reasonable and adequate workspace for Contractors and such other related facilities as may be required by the Contractor to efficiently carry out obligations enumerated herein.

3.5.3 The Contractor shall provide its personnel with computers, phones, and all other equipment required to complete the scope of work described in this contract at no cost to MCSO or the County. For convenience, and at its sole discretion, the Sheriff's Office may choose to provide Contractor personnel will access to equipment such as phones, computers, etc., if such access is available.

3.5.4 As deemed necessary by MCSO's project leader, and in accordance with MCSO Security Guidelines, Contractor's personnel may be issued a courtesy badge that will allow access to County buildings and/or MCSO jail facilities. Courtesy badges are and shall remain the property of the Sheriff's Office and must be promptly returned by persons who will no longer be assigned to the project, or at any time upon the request of MCSO.

3.6 WORK PRODUCT ACCEPTANCE CRITERIA:

3.6.1 Throughout the contract, the Sheriff's Office will review and validate Contractor's work products prior to final acceptance. In addition, the MCSO project leader will verify and approve the Contractor's invoices. Signed acceptance is required from the MCSO project leader to approve an invoice for payment. Work product acceptance criteria shall consist of the following:

3.6.1.1 Specific work is completed as specified and the final work product or service has been rendered.

3.6.1.2 Plans, schedules, designs, documentation, and reports are approved and completed as specified.

3.6.1.3 All supporting documentation for work products are provided and complete.

3.6.1.4 All work products are presented in the approved format to the Sheriff's Office project leader.

3.7 CONTRACTOR ROLES AND RESPONSIBILITIES:

3.7.1 The Contractor shall designate a person to whom all project communications may be addressed and who has the authority to act on all aspects of the contract for services. This person shall be responsible for the overall project and will be the contact for all invoice and Contractor staffing issues.

3.7.2 The Contractor shall provide written reports for review and approval by the Sheriff's Office and shall formally respond to MCSO review findings as necessary.

3.7.3 The Contractor shall maintain staff continuity and subject matter experts throughout the life of the contract. If, however, a substitution becomes necessary, the Contractor must submit a resume for review, in advance, of all proposed personnel substitutions. All Contractor personnel substitutions must be approved by the MCSO project leader. Failure to receive the required approvals may result in termination of the contract.

3.7.4 The Contractor shall work closely with other staff or designated individuals responsible for the successful implementation of the project.

3.7.5 The Contractor and its employees must adhere to MCSO policies and procedures.

3.8 MCSO ROLES AND RESPONSIBILITIES:

3.8.1 Designate an MCSO contact person as project leader to whom Contractor communications regarding the performance of the Scope of Work may be addressed and who will serve as the Contractor's primary point of contact on contract related issues.

3.8.2 Provide access to business and technical documents requested by the Contractor and as determined necessary by the Sheriff's Office for the Contractor to complete tasks and perform in accordance with the Contract.

3.8.3 Ensure, as determined appropriate by the MCSO, that resources are available to perform assigned tasks, attend meetings, and answer questions.

3.8.4 Ensure that decisions are made in a timely manner.

3.8.5 Approve the RFP review team.

3.8.6 Identify and provide access to subject matter experts to assist with the elaboration of technical requirements.

3.8.7 The MCSO project leader will review and approve Contractor's staffing and time allocations for the Contract.

3.9 PROJECT ASSUMPTIONS AND CONSTRAINTS:

3.9.1 The Contractor must disclose any actual or possible conflict of interest with respect to jail management system vendors (defined as entities that offer any of the JMS products or services identified herein). It is the obligation of the Contractor to inform the County of financial interests in any JMS vendor's offer at any time during the Contract.

3.9.2 The Contractor's work hours must be consistent with MCSO key staff. Sheriff's Office usual business hours are 8:00AM to 5:00PM (Arizona time), Monday through Friday, except for standard holidays (see Exhibit 7). However, MCSO jail facilities are operated 24 hours per day, 7 days per week, 365 days per year.

3.9.3 Any modifications to the Contractor's approach to perform the Contract statement of work will be defined, documented and approved by the Contractor and MCSO's project leader prior to starting. As required, formal written amendments will be executed for changes to project scope or cost.

3.9.4 The Contractor and the Sheriff's Office are mutually obligated to keep open and regular channels of communication in order to ensure the successful execution of this Contract. Both parties are responsible for communicating any potential problem or issue to the MCSO project leader and the Contractor's project manager, respectively, within two business days of becoming aware of the problem or issue.

3.9.5 The Contractor shall begin work immediately following the issuance of a Purchase Order.

3.10 BACKGROUND CHECKS AND CLEARANCES:

3.10.1 Contractor's staff (and any subcontractor's staff) providing services under this RFP must undergo a background check to be performed by the Maricopa County Sheriff's Office or other approved law enforcement agency.

3.10.1.1 The background check may also include completion of Arizona Department of Public Safety (DPS) Terminal Operator Certification (TOC) Level "D."

3.10.1.2 Contractor's staff must clear FBI background check prior to entering any facility to complete assessments and/or work. (Forms to be supplied by MCSO.)

3.10.2 Final award of this proposal may be contingent upon the vendor's successful completion of these security clearance requirements.

EXHIBIT D

VENDOR RESPONSE

1. Executive Summary

1.1 Informatix Legal Name, Incorporation and Chief Executive Officer

Informatix is a minority-owned, California-based global technology company that has provided information technology services, including strategic planning, procurement assistance, project management, quality assurance (QA), Independent Verification and Validation (IV&V) application development, system integration and business process redesign services to government and private industry for more than 26 years. Since our establishment in 1986 and incorporation in 1991, Informatix has grown into a premier IT solutions and management consulting company, enjoying a solid reputation for delivering technological solutions and project management services.

Legal Name:	Informatix Inc.
DBA:	121925390
Address:	1740 Creekside Oaks Drive, Suite 175 Sacramento, CA 95833
Phone Number:	916-830-1400
Website:	www.informatixinc.com
State of Incorporation:	California, in 1991
Principal:	Raul Ocazionez
Years Providing Consulting Services:	26 years
Office Locations:	Informatix is headquartered in Sacramento. We have offices in Michigan, Minnesota, Tennessee, Alabama and Kentucky; and data centers located in Sacramento, Georgia, Alabama, and Michigan.

1.2 Informatix History and Qualifications to Serve the Maricopa County Sheriff's Office

Informatix as an organization and our proposed project management consultants, have provided Project Management (PM) oversight, Quality Assurance (QA) and Independent Verification & Validation (IV&V) services for large, complex technology projects in many states and local governments throughout the US, and have worked closely with many state and local government control agencies in ensuring compliance with IT policies and practices. Informatix' thorough understanding of, and experience with, the PMI project management, oversight and risk management approach to requirements, scope, and technological risk and viability – combined with our consultants' ability to work effectively in complex situations – have resulted in a strong track record of success with the government sector in the states identified in Figure 1 on the following page.

Informatix' major lines of business include:

- Project Management (PM)
- Quality Assurance (QA)
- Independent Verification and Validation (IV&V), Independent Project Oversight Consulting (IPOC)
- Full System Development Life Cycle (SDLC) (Customized and COTS)
- Application Maintenance and Operations (M&O)
- Network administration, operations, and support

Help desk (applications, network, Website)

Strategic planning and consulting, including feasibility studies and business process re-engineering

Acquisition/Procurement services

Web/Internet technology

Payment processing

Interactive Voice Response (IVR)

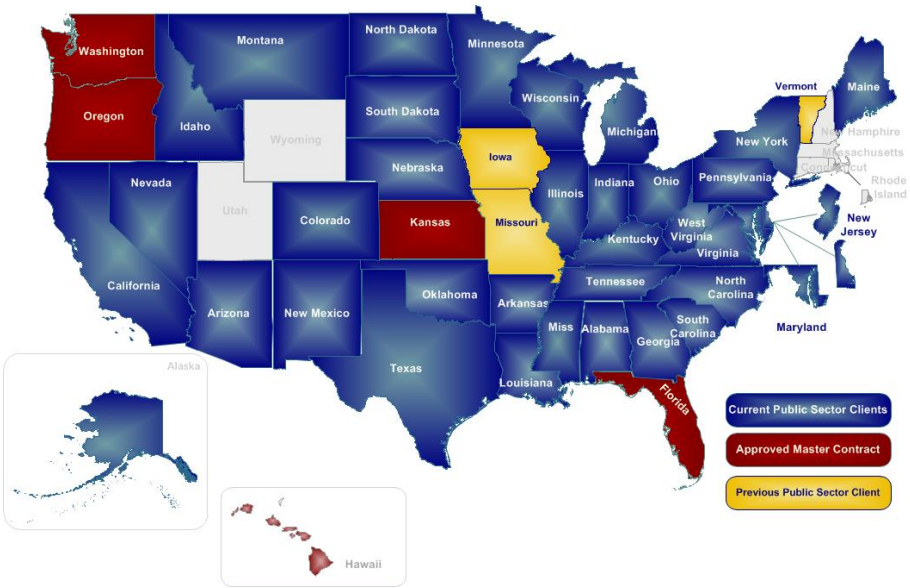
Digital document imaging and storage

Call center management

Data conversion and legacy system migration

Our experience is extensive within the government sector. We have a significant number of government clients across the country.

INFORMATIX PUBLIC SECTOR CLIENTS



1.3 Informatix' Consulting Services

Since our establishment in 1986, Informatix has provided our clients with Project Management and Quality Assurance services as they plan and implement the replacement of their large scale and complex technology applications. The Jail Management System (JMS) Consultant/Program Manager Project is well suited for Informatix as we can offer the MCSO a team of professionals that possess the knowledge, skills and abilities to provide leadership, assistance and advice on matters affecting the goals and objectives of this project.

We have assembled a talented team of professionals from within our organization that have the right skills and experiences for this project. Our proposed team is comprised of individuals who have experiences with:

Providing Quality Assurance and Verification and Validation services in support of the design, build/configure, test and deployment of California's Strategic Offender Management System (SOMS), which is used to manage all aspects of the 33 state prisons

Defining the requirements for a large-scale jail management system for the City of New York

Managing law enforcement and detention practitioners who were responsible for overseeing the operations of one of the nation's top three sheriff's office, detention systems and youth correctional facilities; and

Providing leadership and consulting services to a variety of state and local governments across the full IT system development life cycle, from requirements definition, through RFP development, to vendor evaluation and selection support and into project management and quality assurance of design development and implementation vendors

In addition to Informatix' proposed project staff, we are partnering with the firm of eCorridor, Inc., a Phoenix based organization. eCorridor has delivered consulting services over past 10 years to the MCSO and is intimately familiar with the applications that are proposed for inclusion in the JMS replacement systems. Mr. George Roundy and his professional staff, including Eric Tingom, understand the laws, rules, and regulations governing the state of Arizona and federal laws affecting the MCSO operations.

We also retained the services of Mr. Jerry Harper as a subject matter expert for the JMS project. Mr. Harper has over 48 years of experience running one of the largest jail facilities in the nation and served as Undersheriff at the Los Angeles County Sheriff's Department. Mr. Harper most recently was the Chief Probation Officer for the San Bernardino County, and previously served as Director of California Department of the Youth Authority. He brings a level of functional and operational experience and understanding of the detention and corrections systems.

The diversity of our team members and breadth of their knowledge of law enforcement and detention operations enables Informatix to position itself as a leader for the services and delivery of the scope of work for this project. Our team of professionals has relevant experience and thorough understanding of the current landscape of jail management and other criminal justice systems and associated solution vendors. Their combined skills, knowledge, and experiences will prove beneficial to the MCSO as it plans and implements the three phases of this engagement.

2. Proposal

2.1 Informatix Proposed Team and Proven Methods Differentiates Us

Informatix is excited about the possibility of working with MCSO, its stakeholders and the Technology Bureau project team on this effort. We believe that Informatix, as an organization, and our proposed team meet and exceed all of the RFP's requirements. In addition, we bring *added value* with:

Our hands-on knowledge and experience with the current MSCO JMS through team members' involvement with numerous projects that were the genesis of the current MCSO technology environment.

Our background in Offender and Jail Management related business processes and procedures from both within MCSO and with other state and local governmental entities.

Our experience as project managers for state and local government projects involving requirements gathering, acquisition support, procurement expertise, and project management and oversight of system integration vendors.

The qualifications of our proposed team whose members include:

Bryan Gillgrass, our engagement manager who is a PMI-certified PMP, with a solid track record for overseeing the implementation of numerous high profile projects including the State of California's Strategic Offender Management Systems (SOMS).

Lori Wolfe and **MJ deForte**, both are PMI-certified PMP managers with deep experience providing Acquisition Support services from requirements definition through vendor selection for state and local government clients. MJ provides these services to the City of New York for their acquisition of a new Jail Management System for three of their boroughs.

George Roundy and **Eric Tingom**, bring ten plus years of experience with the MCSO, its Technology Bureau, and its technology systems and environments. Their knowledge and insight, based on many years of managing IT projects and providing consulting services to the MCSO will be invaluable during all three phases of the JMS project.

Jerry Harper, prior Undersheriff of Los Angeles County Sheriff Department and Director of the State of California Youth Authority, has broad knowledge of federal and state level legislative requirements; a thorough understanding of the mission of a Sheriff's Office; and detail knowledge of the breadth and depth of the services delivered by a County Sherriff Office.

Richard Kai, served as Jerry Harpers Finance Director for the State of California's Youth Authority and in a similar capacity with California's Administrative Office of the Courts. Richard and Jerry also participated in the development of the City of New York's Jail Management System requirements gathering and RFP development efforts.

Informatix applauds the MCSO's commitment to project management and the process it has established to ensure the successful implementation of a new JMS and the related technology solutions. Inherent in the effort outlined in the MCSO Jail Management System Consultant/Project Manager RFP is the recognition of the importance of proven project management practices. As describe in the subsequent section of this response, Informatix project management methodology is PMBOK based will enable our project team to:

Use industry-proven project management practices throughout the project to reduce overall risk by detecting and correcting variances, where necessary, as early as possible in the life cycle.

Provide appropriate and timely reports and information to MSCO executives and to the JMS project team and stakeholders.

Develop a Communication Plan the provides for timely and accurate project communication between the project team, executive management, project stakeholders, and project partner agencies to ensure management visibility into the project management processes.

Investigate, assess, and document JMS project risks and issues so appropriate resolution, mitigation and/or contingency planning occurs to lessen adverse effects on project cost, schedule, and/or quality.

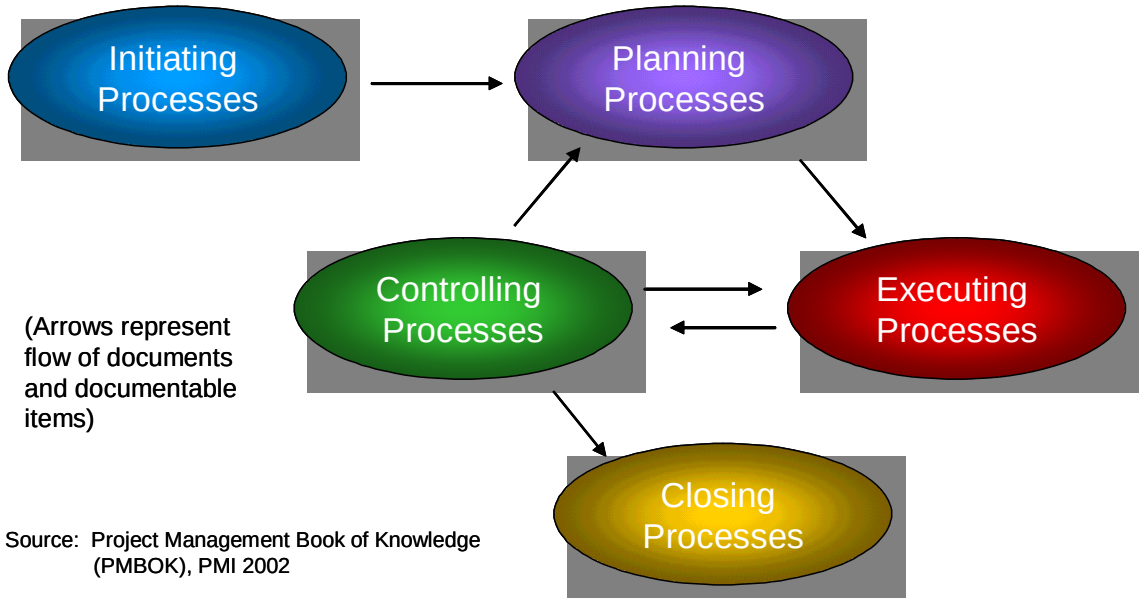
We at Informatix are confident that our proposed team can meet your project objectives. Our project approach and philosophy is based upon close collaboration and teamwork with the MCSO project team and a full appreciation of the unique challenges and business needs of implementing an enterprise-wide solution such as the envisioned JMS. We are excited to be a part of the MCSO JMS project, should we be awarded the opportunity to provide acquisition support and project management services.

2.2 Informatix Project Management Services

Informatix Project Management methodology, described below, will be leverage through all phases of the JMS Replacement Project. For each of the three JMS project phases the Informatix project team will develop a Project Management Plan (PMP) specific to that phase. The PMP will include at minimum, subsidiary plans (described below) detailing scope, schedule, communication, risk, and issue management practices for the specific JMS project phase. Scope is described in the Phase Charter. Project plan/schedule will be developed using MS Project and will include tasks, sub-tasks, key milestones and estimated durations for the work to be accomplished within each project phase. The project plan will also specify Informatix project team, MCSO and other related resources assignments by name and/or job title. The Communication Plan describe the format, content, recipients, frequency and method of distributing each of the communication vehicles to be leverage during the project phase, including the weekly status updates and monthly risk and issue reports.

2.2.1 Our Project Management Methodology

As a standard for all of our projects, Informatix' project managers use PMI's PMBOK as a basis for all project management efforts. The PMBOK is widely recognized as the standard for project management in many industries as well as by many state and local government departments of Information Technology (IT). The following graphic, provides a high level overview of the components of project management. Each component is described below.



Source: Project Management Book of Knowledge (PMBOK), PMI 2002

Initiating – Authorizing the course of action and committing to do so. For the JMS project, this component will be completed at the beginning of each major project phase along with identifying any constraints and assumptions associate with the phase. This ensures the MCSO is ready to commit the resources necessary to complete the phase.

Planning – Devising and maintaining a workable scheme to accomplish the business objectives that the project was undertaken to address. For the JMS project, this component will ensure that various

aspects (such as scope, schedule, communication, change management, risk and issue management, project organization and roles and responsibilities, etc.) of the project are identified and planned prior to executing phase activities. These individual plans will be compiled and delivered in a Project Management Plan (PMP) at the beginning of each phase of the JMS project. Planning is an on-going effort throughout the life of the project.

Executing – Coordinating the people, facilitating the processes (processes utilized include quality assurance, team development, information distribution, and contract administration) and other resources to carry out the plan. For the JMS project, this will include monitoring of each phase of the project and once a JMS provider is selected, planning and managing the JMS service provider project activities through the full system development life cycle will ensure timely completion of the project.

Controlling – Ensuring that phases and project objectives are met by monitoring and measuring progress and taking corrective action when necessary. For the JMS project, these activities ensure timely completion of the phase/project within budget and scope while reducing or mitigating project risks and resolving project issues. The processes utilized during this component will be change control, scope verification, scope change control, schedule control, cost control, quality control, and risk and issue monitoring and control.

Closing – Formalizing acceptance of the project or phase and bringing it to an orderly end. For the JMS project, this will ensure each phase is completed in accordance to contractual and user criteria (as defined in the Quality Assurance Plan) and resolutions are found for all open items or issues. This ensures at project end that all deliverables contracted for are in place and formal project documentation is completed.
For the JMS project, each of these components will be executed in each of the three phases of the project.

2.2.2 JMS Project Management Plan and Subsidiary Plans

As indicated above in the Planning phase, Informatix project management approach consists of developing a Project Management Plan (PMP) for each project and phase. For the MCSO JMS we propose that the PMP include the following series of subsidiary plans, which contain the project/phase details of the various project management processes.

Subsidiary Plan Name	Reference	Subsidiary Plan Description
Scope Management	Developed for each phase of the JMS project	Scope Management is recorded in the project/phase charter and describes all the processes required to ensure that the project/phase includes all the work required, and only the work required, to complete the project/phase successfully. It consists of initiation, scope planning, scope definition, scope verification, and scope change control.
Schedule Management	Developed for each phase of the JMS project	Schedule Management describes the processes required to ensure timely completion of the project/phase. It consists of activity definition, activity sequencing, activity duration estimating, schedule development, and schedule control.
Quality Management	Developed for each phase of the JMS project	Quality Management describes the processes required to ensure that the project/phase will satisfy the needs for which it was undertaken. It consists of quality planning, quality assurance, and quality control.
Human Resources Management	Developed for each phase of the JMS project	Resource Management describes the processes required to make the most effective use of the people involved with the project/phase. It consists of organizational planning, staff acquisitions, and team development.
Communications Management	Developed for each phase of the JMS project	Communications Management describes the processes required to ensure timely and appropriate generation, collection, dissemination, storage, and ultimate disposition of project information. It consists of

Subsidiary Plan Name	Reference	Subsidiary Plan Description
		communications planning, information distribution, performance reporting, and administrative closure.
Change Control	Developed for each phase of the JMS project	The Change Control plan describes the plan for assuring that the project/phase has adequate control over changes to all items necessary for creating or supporting the project/phase deliverables.
Risk Management	Developed for each phase of the JMS project	Risk Management, describes the processes concerned with identifying, analyzing, and responding to project/phase risk. It consists of risk identification, risk quantification, risk response development, and risk response control.
Issue Management	Developed for each phase of the JMS project	Issue Management describes the process of identifying, responding to, escalating, tracking, and resolving issues that arise for each phase of the project.

2.2.3 Overall Project Management Approach and Strategy

Informatix' project management support services will consist of providing project management oversight and direction, including project management processes, tools, analysis, information and recommendations, to the MCSO JMS project team. The effort is comprised of four task groups:

Project Initiation and Planning – The purpose of this task is to develop an integrated PMP that incorporates the various plans from the sub-teams and vendors of the JMS project. Based on the MCSO's review of the PMP, Informatix will finalize and obtain MCSO approval of the Integrated JMS Project Management Plan.

Assist in implementing Project Management processes needed to effectively Execute the JMS – Informatix will support the JMS Project Manager and project staff in executing the ongoing project management processes, policies and oversight activities required to ensure a successful project/phase, including:

Project management support in day-to-day activities
Coordinate with the MCSO PM to ensure that project management procedures are being followed
Maintain an updated Work plan and schedule
Develop and maintain a JMS Project library updated with all project artifacts
Develop and present weekly project reports and updates
Conduct and/or facilitate project management briefings and presentations
Participate in oversight meetings and provide responses, as appropriate
Provide procedural guidance
Provide Monthly Risk and Issue Reports
Provide oversight in cross functional project activities
Ensure the development, delivery and acceptance of all RFP deliverables by JMS project phase

Assist in Training on JMS Project Procedures and Processes – the purpose of this task is to provide training to JMS team members on the processes, standards and procedures established within the JMS PMP, so that team members carry out activities and tasks in a consistent and reportable manner.

Assist in Ongoing Controlling and Monitoring of all Project Activities – Informatix has four basic project monitoring activities that we will employ on the JMS project. We believe that these controlling mechanisms are the foundation of any sound project management methodology:

Proactively monitor the time and resources that are expended during project execution; identify the impact resource utilization has on schedule; recognize when a variance from the approved project management plan and schedule has (or will) occurred; and to initiate appropriate action to address the variance
Consistently document project risks and issues so that they are understood, investigated, assessed, and that appropriate mitigation, resolution and/or contingency planning occurs, to minimize the impact on project schedule and/or quality
Utilize industry proven Project Management practices to detect and correct variations in scope and planned timeline, as early as possible in the life cycle

Support timely and accurate project communication between project-related stakeholders, the project team, and executive sponsors, to provide management visibility into project decisions and at key milestones

Informatix' approach to providing project management services has been proven on multiple projects to provide the guidance and oversight necessary to identify and mitigate risk, improve project results, and contribute to the overall success of the project.

2.3 Phase 1–JMS Requirements Definition

The replacement of the current MCSO JMS and detention systems is an innovative undertaking that will enable Sheriff's Office to enhance its operations and consolidate existing systems such as the Pre-Booking and Inmate Funds/Canteen Systems (IFCS) as well as allow for the interface of data with outside agencies and criminal justice partners. The modernization of the JMS will support the operational effectiveness of the MCSO and assist with better data management, integration of data with outside agencies that interface with MCSO, and will enable the Sheriff's Office to expand its information technology services in the future. The replacement JMS should enable the MCSO to improve its reporting to all stakeholders. Other equally important attributes for the new JMS include:

Provide ready access to near and/or real time data

Automation of data input processes

Reduce paper-based documentation and tracking

Maximize resource management, and

Streamline the pre-booking and inmate fund and canteen processes

We understand that an orderly transformation from the current legacy system to a modern technology environment relies on having the documentation of business, functional, technical and performance requirements that are clear, understood and without ambiguity, and represents current laws, regulations, statutes and law enforcement policies and practices. The design of the new JMS must support the MCSO's goals, enable the organization to achieve its objectives, and possess a robust reporting environment that provides near if not real time data to enable management to make sound decisions based on measureable performance criteria.

2.3.1 Requirements Definition Methodology and Approach

Informatix' Requirements Definition Methodology provides the framework and approach needed to identify, collect, analyze and validate the operational, functional, and technical and performance requirements for the new JMS replacement system. Our Requirements Definition Methodology includes review and analysis of current business process and practices and their available artifacts, analyzing existing enabling technologies and associated system documentation, interviewing representatives of impacted functional areas and work groups, other detention system operators and justice partners for gathering data regarding their business and technical needs and requirements. Our approach for the JMS replacement project starts with consultation with the MCSO project management team to obtain the relevant background details for the JMS project to establish a baseline of understanding and to confirm the scope of the project.

Project Initiation and Planning

Informatix' project team will meet with the MCSO Project Manager to plan the activities to complete the scope of work for this phase of the JMS project, including confirming the objectives, defining our approach and time frames, and gaining agreement on the Phase 1 deliverables.

The Informatix project team will then meet with MCSO's executive steering committee to gain an overall understanding of their vision, project objectives, and activities needed to complete all project related tasks. This meeting helps to verify MCSO leadership understanding of the project goals and validate the project's direction, vision, objectives, scope and potential improvement opportunities. We will document the resulting information in the Project Charter. Risks and issues identified during this process will be captured in the Risk and Issues logs and included in the final PMP.

The Informatix project team will meet with the MCSO Project Manager to review our initial draft the Communications Plan for Phase 1. We will work with the Project Manager to identify members of the work groups representing the affected functional areas, and stakeholders outside the County boundary as well as criminal justice agencies and other key personnel within the Sheriff's Office. We will prepare the initial draft of the Communications Plan for review and comment and finalize the Plan for acceptance by the MCSO Project Manager and project sponsors.

Next we will refine the high level work plan and specify at a detailed level all of the tasks, sub tasks and milestones necessary to complete this phase of the JMS Replacement project.

The revised Project Charter, Detailed Project Plan and Schedule, Communication Plan PMP and Risk and Issue logs will be included in the final PMP for the JMS Requirements Definition phase of the JMS project.

Meetings and Progress Reporting
As described previously, our project management approach includes ongoing updates to the JMS PMP and agreed to subsidiary plans including, Project Schedule, Communication Plan and Risk and Issue logs.

Informatix will prepare Weekly Status and Monthly Risk and Issues Reports and highlight when a variance from the baseline plan has occurred or is likely to occur. We will work with the MCSO Project Manager to initiate appropriate action to address the variance and track the identification and resolution of project issues.

We will meet with the MCSO Project Manager on a regular basis to discuss the contents of the Weekly Status and Monthly Risk and Issues report. We will work the MCSO Project Manager to mitigate identified risks and resolve outstanding issues with the appropriate level of management, and present the project's status, identified risk and issues, remediation plans and actions taken to resolve problems at meetings with the JMS t Executive Steering Committee. The Weekly Status and Monthly Risk and Issues Reports will provide a summary of activities completed during the status period, activities that are in progress, any open issues with assignments for their resolution, and reasons for delays encountered. We will identify project risks with related mitigation activities as part of our weekly and monthly reporting commitments. An updated project schedule will be included with the status report, as necessary.

Project Management Tasks Deliverables

Project Management Plan and updates

Communications Plan

Weekly Status Reports

Monthly Risk and Issues Reports

Detailed Project Schedule

2.3.2 Requirements Gathering Tasks

During this phase, the Informatix project team will review and analyze relevant artifacts and data, including information concerning replacement of the current JMS, Detention, Pre-Booking, and IFCS systems, and other internal applications or databases used in the to manage the MCSO day to day operations. We will interview key stakeholders of the functional areas listed in Section 3.2.3 of the RFP, and conduct focused work group discussions with outside agency personnel identified by the MCSO Project Manager. We work with the MCSO Project Manager to arrange meetings with criminal justice partners residing outside the MCSO to obtain their requirements for processing, producing, and/or consuming data for or from Pre-Booking, JMS, and IFCS. Finally, we will conduct interviews with identified Sheriff's Office personnel who are knowledgeable of other automated systems (i.e. Detention systems) and their data requirements. We will gather input from these subject matter experts to complete the initial requirements gathering tasks.

Our analysis of the "as is" state of MCSO's systems is intended to provide the Informatix project team with an understanding of the processes, policies, procedures, risks and issues representing the Pre-Booking, JMS, Detention and IFCS technical environments. Ultimately, we need gain a complete enterprise-wide

understanding of "who is doing what" and "what works and what does not work" within the MSCO. This will enable us to leverage the strengths and opportunities of the current design as requirements for the new solution and resolutions to mitigate existing weaknesses and challenges. The results of our analysis of the data gathered will enable us to begin developing rough sketches of the current workflow and "as is" state for use in the Requirements Identification Task of Phase 1.

Requirements Gathering Task Deliverables

Documentation of user/stakeholder interviews

Workflow diagrams and related analytical documents

Report describing the "as is" state of MCSO detention systems

2.3.3 Requirements Identification Task

The objective of the Requirements Identification Task is to incorporate the information collected to date into a Requirements Traceability Matrix (RTM) populated with the business requirements, functional needs, and technical system and performance requirements gathered during the Requirements gathering Task. Informatix proposes to leverage its Project Monitoring and Quality Assurance Methodology descried in Phase 3 to create the RTM and capture information related to the MCSO JMS replacement project. The RTM has several features that enable our project team to trace the origin of the identified business and technical requirements to the design of the new jail management system and retrace those requirements backwards from the system design to the origin of the requirements. This matrix also provides the basis for developing User Acceptance Test criteria and test cases for use in the Design, Development/Configuration and Implementation (DDI) phase of the project.
The development and use of a RTM introduces a systemic approach to elicit, organize, document and verify that the solution vendor's design complies with the new JMS business solution. Requirements traceability is an essential activity of good requirements management that records input from information obtained from artifact reviews, interviews and work group sessions. It allows for the analysis of the "as is" state, applying of knowledge gained from the industry's leading and better business practices, identifying available and emerging technologies, and new developments and future jail management trends. The ability to perform traceability adds confidence that the SI has met the JMS requirements throughout the systems development lifecycle and serves as an indicator that the new application will meet the critical success factors for the new jail management system.

Activities to perform the Requirements Identification Task include:

Requirements Identification – The Informatix project team will work closely with key stakeholders identified by the MCSO Project Manager to gather, verify and review the requirements gathered through artifact review, interviews with functional area personnel, work group sessions, external stakeholders, and data elements from other agency criminal justice and the current detention systems.

Requirements Validation – This activity will focus on the review of the requirements identified from the above activity and data gathered from our analysis of the current jail management and related legacy software solutions. We will perform a technical review of the current operating environment as well as the MCSO's growth strategy in order to confirm, validate and document the requirements for the new jail management system.

Requirements Traceability Matrix - The RTM records the validated requirements along their related business needs, functions and organizational relationships, and provides the ability to trace each item forward from the business need through the system design, build and testing phases and backwards from the (regression) testing results to the initial identification of the business and functional requirement.

Our team will extract and review the business, functional, technical and performance requirements for the new system to confirm their completeness and document them in the RTM for review and approval by the MSCO Project Manager.

Requirements Identification Task Deliverables

Requirements (functional specifications) for the JMS replacement RFP

Requirements Traceability Matrix

2.3.4 Conceptual Design Task

The desired future state vision includes a new jail management system that will provide key components of the existing system but also deliver enhanced workflows, and at the same time be scalable to allow for future enhancements. The goal is to not only focus on migration of existing features, but to add new jail management and detention functionality, and incorporate inmate funds/Canteen and Pre-Booking functionality. The new JMS should enhance the capabilities of the MCSO including:

Availability and maintenance of accurate jail and detention data

Access to JMS data and sharing of data on an enterprise-wide basis

Management information based on near if not real time data that is reliable, accurate and provides transparency and accountability, enhanced reporting capabilities, ease of use, and portability,

Scalable as demands increase and support integration with other criminal justice agencies systems,

Quickly adapt to approved an/or pending local, state and federal legislation and regulations, and

Leverage industry better practices and adaptable to emerging technologies and future trends in jail management systems

Once our team receives feedback from MCSO leadership on the identified JMS requirements documented in the RTM, we will create the future “conceptual” JMS model including a high-level technology environment, security constructs, high level data schema, and business process descriptions that are enabled by the new JMS. We believe that the benefits of this approach is that it presents the MCSO leadership with a potential vision to focus the discussion on tangible solutions and avoids “blue sky” scenarios that often result in process decisions that fail to account for the capabilities of technology or limitations and constrains imposed by local, state, or federal regulations. We will update the future state model with the appropriate feedback from the MCSO Project Manager and JMS Executive Steering Committee members and submit the final conceptual model to project leadership for final review and approval.

The Informatix project team will work with the MCSO Project Manager and JMS Executive Steering Committee to leverage the requirements defined to date and the future “conceptual” JMS model to specify and collate the potential Scope of Work (SOW) for the JMS replacement system RFP. The choice of the technology and security architectures for the system are important part of the solicitation and our team will focus on the technological solution as well as the specific jail management and corrections expertise that the MCSO is seeking in an solution vendor. We will assist with the development of the initial scope of work document by creating a draft for review and approval by the MCSO Project Manager and JMS Executive Steering Committee. We will also retain a record of the existing MCSO IT environment as input to the design of the final IT architecture required in Phase 3.

During the pre-RFP development activities, we will begin discussion on the criteria for the vendor selection process, which will be needed in Phase 2 of the JMS project. This activity will also include discussion on the development and inclusion of a proposed timeline and milestones for the JMS implementation based on the MCSO priorities and constraints, as well as a recommendation of tools and desired approach for implementing the JMS throughout the MCSO.

Informatix will create a secured documentation library to deposit pertinent project artifacts, interview notes, weekly and monthly reports, and other project documents that is accessible by the project team members for each phase of the JMS Replacement project.

Conceptual Design Task Deliverables

Conceptual design for the new JMS

Initial scope of work for the JMS Replacement System RFP

Creation of the Project Library

Record of documents and artifacts stored in the library

2.4 Phase 2 JMS RFP Development and Vendor Selection

We understand that an orderly transformation from the current legacy system to a modern technology environment relies on having the documentation of business, functional, technical and performance requirements that are clear, understood and without ambiguity, and represents current laws, regulations, statutes and law enforcement policies and practices. The design of the new JMS must support the MCSO's goals, enable the organization to achieve its objectives, and possess a robust reporting environment that provides near if not real time data to enable management to make sound decisions based on measureable performance criteria.

Informatix will leverage its Procurement Support and Vendor Selection methodologies as the basis for preparing the Request for Proposal (RFP) specifying the requirements of a new Jail Management System (JMS) and providing the, MCSO with vendor evaluation criteria, scoring tool, and selection methodology. Our team includes subject matter professionals who have supported solicitations for numerous custom developed software solutions and COTS packages of similar size and scope. These efforts included analysis of market place offerings, compiling of requirements, preparation of draft and final solicitation documents, preparation of evaluation approach and supporting tools, review of vendor responses, assessment of software features, and assistance with contract reviews.

Informatix understands that this procurement effort must consider the complexities of the organization, its operating environment, business goals and strategies and its governing rules and regulations. Informatix will guide the MCSO during this phase with recommendations for the inclusion of governance, privacy and security, technical operations, legal, and finance requirements. Our team will lead the development of RFP sections including the scope of work, related terms and conditions, instructions, payment provisions, and price structure. In addition, our team has the experience to assist MCSO in confirming its procurement strategy, creating the RFP documents consistent with MCSO and the Maricopa County Procurement Guide, developing the evaluation methodology and approach, and providing facilitation assistance and process support in the evaluation of proposals.

Leveraging methodologies, Informatix proposes the following six tasks to compile an RFP that will foster competition and result in the identification of a JMS software solution and vendor to best meet MCSO's requirements. Our proposed methodology to complete this procurement effort is based both on industry standards (IEEE, SEI CMMI, PMBOK) and key success factors gained from numerous similar projects we have completed for our government clients.

2.4.1 Project Initiation and Management

As described earlier in this proposal, the planning tasks associated with each Phase helps to clarify the project goals and objectives, identify all known project constraints, understand project communications, identify the MCSO's internal and external project participants and their roles and responsibilities associated with this effort. This step is structured to leave both the MCSO and Informatix with a clear understanding of the path leading up to the completed RFP and successful procurement. The Project management plan (PMP) for this phase of the JMS project will confirm the intended scope of the JMS solisitation documents, the involvement of MCSO staff, the involvement of other critical stakeholders, the timing of their involvement, and will consistently set expectations of the effort. During this task the Project's PMP, charter and schedule will be updated for Phase 2. The Communication Plan will also be refreshed to reflect Phase 2 participants and status reporting mechanisms.

An important component of this task will be to conduct a Phase 2 kick-off meeting with MCSO stakeholders and project participants. At this meeting, Informatix will present the work plan, schedule, activities, and key team members, and address any questions the MCSO may have about the procurement process.

Project Initiation and Management Deliverables

- Updated Project Management Plan, including project/phase scope, schedule, resource roles and responsibilities, deliverables and their acceptance criteria
- Updated Communication Plan
- Weekly Status Reports

Monthly Risk and Issue Reports

Phase 2 Kick Off Meeting Agenda

2.4.2 Requirements Analysis

The Informatix team will leverage the Requirements Traceability Matrix (RTM) developed in Phase 1 of this engagement to extract, collate and finalize the RFP requirements. In addition to validating and confirming these requirements, Informatix and the MCSO must prioritize those requirements in order to provide MCSO with the information it needs to differentiate between the possible approaches/solutions proposed by vendors.

Informatix will conduct a 2-3 hour Workshop with MCSO selected participants. We will review the Requirements Traceability Matrix (RTM) developed in Phase 1. Following the review of the requirements, we will discuss whether they should be incorporated into the RFP as requirements or as directional statements, measurable business objectives, evaluation criteria, etc. We will also discuss key process or regulatory constraints that should be included as requirements in the RFP as well as the reporting requirements for the JMS.

Informatix will update the RTM that documents the business, functional, technical and performance requirements for the JMS solution. The RTM will list requirements within functional areas and provide for the classification of requirements by requirement ID, name and source. The RTM provides Informatix and the MCSO the opportunity to ensure completeness and that requirements are not omitted as work proceeds.

Once updated the RTM will be distributed to MCSO evaluators for final approval. The Informatix team will review any additional RFP specifications and identify potential risks and questions that might be posed to provide clarity and additional detail around specific RFP elements. These potential risks and questions will be provided to MCSO evaluators for consideration.

Requirements Analysis Deliverables

Updated Requirements Traceability Matrix

Documentation of Potential Risk and Questions pertain to the RFP

2.4.3 Confirm/Refine Procurement Strategy

Informatix will review our procurement methodology and approach with the MCSO and verify that it will meet the objectives of the MCSO based on the agreed upon requirements. During this task, Informatix will refine the approach to the procurement process and bring the MCSO's Project Management to a common level of understanding regarding procurement objectives, outcomes, and deliverables.

Informatix will work with the MCSO to determine which bidding steps will be included in this RFP. There are several potential bidding steps for competitive procurements, including Bidders Conference, Conceptual Proposals, Draft Proposals, Confidential Discussions, Final Proposals, and Interviews. Based on the analysis and information gathered in previous tasks, Informatix will discuss the purpose, benefits, limitations, and drawbacks of using each of these steps with the MCSO to determine which specific steps will be included in the solicitation documents.

We will take a "fresh" look at the scope of the project and develop broad statements of scope that can be used in both the introductory sections of the RFP as well as provide a framework for consideration of market and industry capabilities and alignment.

The Informatix Team will conduct an analysis of the key risks to the procurement in order to proactively identify and mitigate the risk of protest and/or selection of less than optimal solutions. For example, we will consider procurement process risks, evaluation and selection challenges and key factors that lead to protests based on historical experience.

During this task we will lead discussions on how best to structure the RFP in order to obtain the information required to populate future scoring models. We will discuss how to ensure that vendors understand the process for submitting responses to the RFP as well as the technical, financial, quality and personnel requirements of the request.

Informatix will lead the development of a cost model of the RFP. Informatix will provide fiscal analysis as needed and develop a cost model that incorporates the following features:

- Provides for a direct comparison of Bidder costs
- Establishes a framework that requires a full disclosure of the costs of Bidder products and services, including third party costs.
- Includes a well-defined payment structure that provides cost predictability
- Enables Bidders the flexibility to propose goods and services in a way that is consistent with industry pricing practices

Confirm/Refine Procurement Strategy Deliverables

- Refined Procurement Process
- Procurement Cost Model

2.4.4 RFP Development

The approach to the MCSO procurement must be straightforward, objective and compliant with not only MCSO's standards, but also relevant Maricopa County Procurement Code guidelines and requirements. Procurement Support represents one of the most critical phases of the JMS procurement efforts, in that failure to execute a consistent and well-planned procurement process can result in significant delays, vendor protests and selection of a less than optimal solution.

The Informatix team will assist with the development of the solicitation document by creating a draft that can be reviewed and approved by MCSO JMS Executive Steering committee and prominent stakeholders. This activity will also include development and inclusion of a proposed timeline and milestones for the implementation that should be achieved based on MCSO priorities as well as a recommendation of tools and approach for implementation.

The RFP will be developed so that the bidders have a clear understanding of the MCSO's needs so that they will be able to deliver quality services, timely, and within budget. The RFP must also allow the means for the MCSO to monitor the winning bidder's progress during the contract to detect problems and/or delays before they become critical.

Informatix develops RFPs that providing this structure by:

- Clearly defining the contract scope, deliverables, and administrative and technical requirements. The scope of work will be detailed and will include, at a minimum, the following:
  - A clear and concise description of the work to be performed
  - Vendor expectations
  - Business, functional, technical and performance requirements, and legal limitations
  - Performance timelines, completion dates, and methods of measurement
  - A description of the items, products, and results to be delivered
  - Response formats and proposal evaluation criteria
- Including language that allows the MCSO to objectively monitor the vendor's performance. The MCSO must ensure that sound processes are in place in order to assure delivery of products meeting requirements. The contract must allow the MCSO access to contractor processes and data for evaluation.
- Incorporating into the contract project management standards and processes that the vendor must follow.
- Ensuring the contract specifies the technical standards that must be followed by the vendor.
- Clearly describing the contract deliverable acceptance processes.
- Clearly describing a process for issue resolution and escalation, including time limits for escalation to the next level. Clearly describing a process for vendor personnel replacement.
- Protecting the MCSO monetarily, by implementing such features as payment holdbacks, payment upon deliverable acceptance, and/or liquidated damages

During this task we will also establish the evaluation and scoring model that will build consensus among procurement team members. The evaluation model discussion will focus on IT industry best practice selection criteria and weighting strategies that will identify subtle differences in vendor proposals.

Informatix will work closely with the MCSO to refine the evaluation criteria and develop the scoring model that will be used in evaluating Bidder proposals. Informatix will conduct an Evaluation Planning Workshop in order to provide members with an overview of the possible evaluation strategies and a framework for scoring and evaluating proposals, including pass/fail and score-able proposal elements.

The concurrent development of the evaluation methodology and criteria with the RFP documents is essential to ensure the RFP response requires presentation of all information necessary for the evaluation. The evaluation process and plan will identify the evaluation team members, roles and responsibilities, and will address such issues as:

Will a single or multiple evaluation teams be used?

What scoring model will be used (e.g., consensus, averaging)?

Will interviews occur as part of the evaluation process?

Will mandatory and desirable requirements be included/scored in the proposals?

What additional departmental approvals, outside of the evaluation team, are necessary? When?

The evaluation plan will include the necessary templates and tools to allow the Evaluation Team to effectively and efficiently score Bidder proposals and properly document the evaluation process. Areas of evaluation should include:

Ensuring the solution vendor's proposal has technical merit; their proposal must indicate an understanding of the requirements and describe their approach in ways that demonstrate their technical competence to implement their proposal.

Ensuring the solution vendor's proposal has appropriate and substantiated costs with services and deliverables aligned to payments, with adequate justification and valid assumptions that shows the vendor understands the scope of the problem and has an approach that modeling and other engineering tests demonstrate is workable.

Ensuring the solution vendor has the ability to manage the proposed project, including the means to implement and monitor the processes critical l to the project's success.

We will also discuss the specific evaluation criteria and their weighting that will be used to assess and score Bidder responses to the JMS RFP. The following diagram is an example of evaluation weighting.

Example Evaluation Weighting

Evaluation Categories	Method/Weight
Content Validation	Pass/Fail
Bidder Qualifications	Pass/Fail
Administrative Requirements	Pass/Fail
Technical Requirements Response	Pass/Fail
Functional Requirements Response	Pass/Fail
Performance Requirements Response	Pass/Fail
Implementation Requirements Response	Pass/Fail
Service Support Requirements (O&M)	Pass/Fail
Bidder Qualifications	30%
Firm Project Experience	
Project Team Organization and Staffing	
Business Solution Assessment	30%
Technical Approach/Assessment	

Evaluation Categories	Method/Weight
Functional Approach/Assessment	
Implementation Approach/Assessment	
Service Support Assessment	
Cost	40%

In addition, key evaluation processes will be defined in a way that provides a defensible structure for the evaluation.

Informatix will facilitate a structured and disciplined review by the MCSO JMS Evaluation Team of the RFP documents. Our experience has shown that this process, unless well planned, can result in significant delays to the procurement schedule and ultimately, the realization of business benefits. Informatix will meet with the MCSO Project Manager and other stakeholders in order to recommend a review process and timeline as well as define key responsibilities and decision points in the process.

During this task Informatix will provide support addressing questions regarding the JMS RFP during the MCSO's review and approval process. Drafts will be provided throughout the RFP development for the MCSO's review. Our objective is to support the MCSO in the timely and efficient finalization of the JMS RFP.

Informatix will conduct at a minimum, two separate reviews in order to gather feedback and suggested changes from internal and external stakeholders. We will establish a change control point in order to ensure version control as well as optimize RFP change communications. The first review will be conducted by the MCSO Project Manager, procurement/contract participants, and internal stakeholders. Based on the initial draft RFP review, Informatix will produce a final draft for review by the MCSO.

After each defined review period, Informatix will schedule one meeting to discuss the required changes, and then confirm the changes have been made to the RFP documentation.

Following the review periods, Informatix will finalize the RFP and supporting documents and submit to County for publishing.

RFP Development Deliverable

Finalized RFP for replacement of JMS and related detention systems

2.4.5 Procurement Support

After the JMS RFP is published, we will assist the MCSO with administration of the RFP process, including responses to vendor questions, facilitating the evaluation of bidder proposals, conducting interviews with the top scoring bidders, and assisting the MCSO in making the final vendor selection. Informatix team will assist the MCSO throughout the RFP process and refine the RFP requirements to reflect the exchange of information, which will be made available to bidders through JMS RFP Addenda.

Informatix team will help the Sheriff's Office identify members for their Evaluation Team and train the Evaluation team on the evaluation tools and procedures. Our team will support the Evaluation Team to conduct detailed assessments using the previously defined evaluation criteria that will be scored during the vendor selection process in order to select the Bidder whose services best satisfy the overall requirements of the Project.

Informatix will assist the MCSO in communicating with Bidders during the time from JMS RFP release until proposals are due. This assistance will include answering Bidder questions regarding the scope of work or the RFP, and, as needed, assistance in the preparation of formal responses to vendor questions, inquiries, or addenda to the JMS RFP as may be required.

Once the bidder's proposals have been received, we will prepare a Proposal Assessment Matrix (PAM) that lists the criteria established during the pre-selection stage and then a brief description of each offeror's experience, qualifications, and/or capabilities in each category as described in their proposal documents.

In the case of JMS COTS providers, the description may include the key product features requested by MCSO, information on market adoption, maturity of the product, compatibility with current infrastructure, existing software products, interoperability standards, long term viability of the company, cost, performance, and support offered by vendor as it considers new products for the project. This analysis will include reviews by subject matter professionals within our team. The PAM provides the evaluation team a useful tool when used in conjunction with a detailed proposal review, for evaluating and comparing the submitted proposals.

Informatix team will support the MCSO's Evaluation Team conduct detailed assessments of proposals. Using the developed evaluation procedures as a guide, Informatix will facilitate the evaluation process. Mandatory, administrative, and compliance requirements will be evaluated first to determine Pass/Fail result.

For proposals that pass the first round, Informatix will work with the MCSO's Evaluation Team to evaluate the proposals using the Requirement Traceability Matrix and evaluation scoring.

Vendor interviews can be a key component of the selection process. If the MCSO elects to utilize vendor demonstrations, Informatix will support the process. Through a face-to-face interview and/or demonstration process, Bidders will be asked to demonstrate their proposed solution. Careful selection of the specific questions to ask the vendors and creating a matrix of expected answers and scoring criteria will maximize the value of the interviews. The MCSO may choose to select the top three scoring vendor based on initial assessment, or any number of vendors that the MCSO deems as appropriate, for interview.

Informatix will assist the MCSO's Evaluation Team as needed in the preparation of materials to be sent to the Bidders in advance of vendor demonstrations as well as participating in the interviews.

Once the MCSO evaluation team has determined a short list of vendors, we can help facilitate the planning of oral presentation sessions for each vendor (for e.g. we can help draft a list of questions to be asked, we can identify key criteria from the PAM that MCSO may want to assess the vendor on, etc.). Based on the information in the proposals as well as the additional information gained during the oral presentations, our team will update and submit a final PAM for consideration by the MCSO Evaluation Team. MCSO evaluators will then complete their final scoring based on the available information (e.g. proposals, responses to any questions and answers, oral presentations, their own independent assessments, and the summary information documented in the PAM, etc.).

In the event of a bidder protest, Informatix will assist the MCSO in preparing documents in response to a bidder's protest or appeal. We will work with the MCSO and the Maricopa County Offices of Procurement Services, and attend and testify at hearings to help resolve the protest or appeal.

Procurement Support Deliverables

Answers to bidder questions

RFP addenda

Final Proposal Assessment Matrix — the final matrix provides updated information based on additional clarifications provided by the proposers during the orals/product demonstrations and site visit process (if applicable) as well as MCSO evaluator's final assessments of the vendor proposals and oral presentations.

2.4.6 Post Selection Assistance

Based upon the analysis of Final JMS vendor proposals, the Informatix team will assist the MCSO Evaluation Team in recommending the vendor whose solution and services best satisfy the overall requirements of the JMS Replacement System. Working closely with the Evaluation Team, we will develop the Evaluation and Selection Report that outlines the vendor selection process and rationale for the contract award.

After the MCSO Evaluation Team has made their final selection, the Informatix team will summarize the MCSO evaluation and selection process in a Final Evaluation and Consensus Report. The team may also provide support and assistance to MCSO in negotiating a contract with the selected vendor and review of Task Orders that may be drafted and will further define the scope of the work for the JMS RFP. Please note, however, that we cannot negotiate on behalf of MCSO or provide legal advice. Our team can, however, provide information and an assessment of risk relative to the scope, objectives, and timing of the contractor's scope of services and deliverables.

Post Selection Assistance Deliverable

Final Evaluation and Consensus Report

2.5 Phase 3 New JMS Implementation Tasks

The Informatix' Project Monitoring and Quality Assurance (PMQA) Methodology will guide the project team and assist them through the JMS Implementation activities described in Phase 3 of the MCSO JMS Consultant/Project manager RFP. Our PM/QA Methodology combines the knowledge, skills and experiences of the project team members with the tools and techniques needed to monitor and assess the quality of the system integrator's services and deliverables. A brief description of Informatix' PMQA Methodology is as follows:

Project Monitoring Upon selection of solution vendor, Informatix team will focus on providing objective observations in our assessment and reporting on the solution vendor's overall project performance, including its project management processes, team organization, project schedule, budget, risks and issues. Informatix' project team will monitor and provide leadership and advice to the MCSO throughout the JMS Implementation project phase to ensure the project goals, objectives and operational requirements are met, and the solution vendor's management of the project meets industry best practices. The bottom line is to monitor and report on risks and issues affecting the project's schedule, scope and costs to the MCSO Project Manager on a timely basis to ensure the project is an overall success

Quality Assurance – This activity focuses on assessing pre-defined project standards and procedures and contract compliance in accordance with solution vendors project management plans and our expectations for the quality and content of deliverables for each phase of the project's system development lifecycle. Our QA approach provides leadership and advice to the solution vendor and the MCSO project team in the development of detailed design documentation, system architecture, test plans, as well as proposed interfaces and data conversion processes. We will document our review findings, observations and recommend resolutions in our Weekly and Monthly reports to the MCSO Project Manager.

Our PMQA Methodology is thorough and designed to help drive quality in the project practices as well as the project deliverables. It includes adherence to sound project management practices that have a high

correlation to project success as well as managing the risks that commonly threaten complex projects such as the MCSO JMS replacement project. .

2.5.1 Phase 3 Project Initiation and Management

As described earlier in this proposal, the planning tasks associated with each Phase helps to clarify the project goals and objectives, identify all known project constraints, understand project communications, identify the MCSO's internal and external project participants and their roles and responsibilities associated with this effort. This step is structured to leave both the MCSO and Informatix with a clear understanding of the path leading up to the successful implementation of the JMS Replacement System. The Project management plan (PMP) for this phase of the JMS project will confirm the intended scope of the JMS Implementation phase, the involvement of MCSO staff, the involvement of other critical stakeholders, the timing of their involvement, and will consistently set expectations of the effort. During this task the Project's PMP, charter and schedule will be updated for Phase 3. The Communication Plan will also be refreshed to reflect Phase 3 participants and status reporting mechanisms.

An important component of this task will be to conduct a Phase 3 kick-off meeting with MCSO stakeholders, project participants and the newly selected solution vendor. At this meeting, Informatix will present the work plan, schedule, activities, and key team members, and address any questions the MCSO may have about the JMS Implementation phase.

Project Initiation and Management Deliverables

- Updated Project Management Plan, including project/phase scope, schedule, resource roles and responsibilities, deliverables and their acceptance criteria
- Updated Communication Plan
- Weekly Status Reports
- Monthly Risk and Issue Reports
- Phase 3 Kick Off Meeting Agenda

2.5.2 Implementation Phase Leadership and Advice

The Informatix PM team provider leadership and advice for the project team throughout the implementation phase of the JMS Replacement System project to ensure that the MCSO's goals, objectives and operational requirements are met, industry best practices are incorporated into the business solution, and the project is an overall success. A key to providing leadership and advice during the JMS implementation phase is to have a thorough understanding of how the solution vendor plans to manage the system development life cycle (SDLC) need to implement their proposed solution.

We will conduct a review of the solution vendors project management plans, methodologies and approach to monitoring the critical elements of its work plan and schedule. In addition, we will work with the solution vendor to develop agreed-upon quality control criteria and review their deliverables against those criteria. During this phase and throughout the project, Informatix' project team will discuss and mentor the MCSO project team on qualities of sound project management practices, project monitoring and quality assurance techniques that can be leveraged to minimize project related risks. Throughout this process, we will prepare our Weekly Status and Monthly Risk and Issue Reports to report our findings and observations, and propose recommendations to minimize risks and issues, and assess their potential impact on the quality of the deliverable.

Implementation Phase Leadership and Advice Deliverables

- Updated PMP and Subsidiary Reports, as needed
- Weekly Status Reports
- Monthly Risk and Issue Reports
- Ongoing Consultation with MCSO Project Team and Solution Vendor

2.5.3 JMS Fit/Gap Analysis

Our PMQA approach guides the review of the solution vendor's detailed comparison of the proposed new JMS functionality with the MCSO JMS RTM developed in earlier phases of the JMS project. Our approach provides the MCSO with a Fit/Gap Assessment Report of the solution vendors JMS capabilities as compared with the MCSO RTM. We will document how the solution vendor proposes to meet each of the MCSO business, functional, technical and performance requirements and provide our assessment of their proposed response. Where there is a gap in the proposed systems ability to meet a predefined MCSO requirement, we will document the gap and propose an approach to resolving the open item or closing the gap. We will document our findings and observations in the JMS Fit/Gap Analysis Report.

JMS Fit/Gap Analysis Deliverable

JMS Fit/Gap Analysis Report

2.5.4 Required Project Management Consultant Tasks

The Informatix PM team will then develop specific sections in the PMP for JMS Implementation phase specifying the scope, schedule, resources and acceptance criteria for each of the required deliverables outlined in section 3.4 of the MCSO JMS Consultant/Project Manager RFP. We will obtain approval of the MCSO Project Manager to proceed with each of these PM Consultant assigned tasks and associated deliverables. Following our prescribed project management methodology, as we receive approval to proceed initiate each of these PM Consultant tasks the Informatix PM team, working with the JMS Project Manager will then facilitate a meeting with the solution vendor and impacted MCSO stakeholders. During this briefing session we will sharing the scope, schedule, resource assignments and acceptance criteria associated with the development and delivery of each of the Phase 3 PM deliverables listed below.

The Informatix PM team will track progress against the work plans for each PM Consultant task and will meet with the MCSO Project Manager on a regular basis to discuss progress to date, review of any risk that have been identified or issues that have occurred and what we anticipate to accomplish in the upcoming weeks. We will work the MCSO Project Manager to resolve outstanding issues and implement risk mitigation plans, when necessary. This information will be documented and published in our Weekly Status and Monthly Risk and Issues Report's. The Weekly Status Report will summarize activities for each PM Consultant task, activities in progress, any open issues with status and assignments for resolution, and identification of risk that require mitigation activities. An updated project schedule will be included with the status report for each PM Consultant task, if warranted.

Required Project Management Consultant Task Deliverables

Updated PMP

Project and Communication Plan updates

Project Schedule updates

PM Weekly Status Reports

PM Monthly Risk and Issues Reports

Updated Requirements Traceability Matrix, if necessary

PM Consultant Tasks and Deliverables identified in the table below

PM Consultant Assigned Task	Expected PM Deliverable
1. IT Architecture Proposal – Working with the solution vendor and MCSO team propose the IT architecture for the replacement JMS system. Once approved we will coordinate the procurement activities with MCSO personnel, and oversee the set-up of the system environment, including test and production systems.	Proposed IT architecture for the replacement JMS System. IT Architecture Procurement task plan, resource assignments and schedule to manage and coordinate the procurement activities need to acquire approved IT Architecture components. IT Architecture Implementation task plan and schedule monitoring set-up of the system environment, including test and production

PM Consultant Assigned Task	Expected PM Deliverable
	systems. Monitor and report against IT Architecture Task plans.
2. System Training – Ensure training is provided to project team members such that they have the knowledge and skill necessary to successfully navigate and utilize the new JMS during development and implementation.	Acceptance criteria of system training for the JMS project team and affected MCSO stakeholders. Verification that each individual received and understood the training material.
3. Provide direction for the project team to perform system set-up activities such as the population of system tables, user configurations, user role definitions and system permissions, preparation of documentation, system options configuration, etc	System set-up task plan, resource assignments and schedule to manage and coordinate the system set up activities. Monitor and report against System set-up Task plan.
4. Data Conversion –. Lead the project team in all data conversion activities. Provide analysis as to which data to convert into the new JMS and obtain approval from MCSO. Develop Task plan, resource assignments and schedule that covers data cleanup, data staging, and the actual conversion process.	Data Conversion Report describing data to be converted to the new JMS. Written Data Conversion Plan including scope of data conversion, resource assignments and schedule to manage and coordinate all data conversion activities.
5. Data Integration – Lead the project team in all data integration activities, decisions regarding transfer protocols and data elements from the new JMS to be fed to external systems, as well as the actual development and implementation of data feeds.	JMS Data Integration Plan. Data Integration task plan, resource assignments and schedule to manage and coordinate the development and implementation of approved data feeds. Monitor and report against Data Integration Ttask plan.
6. System Testing – Lead the project team in the development of detailed test plans, including unit, integration, and load testing, as well as interfaces and data conversion processes. Lead testing activities and ensure appropriate corrections are implemented to resolve any issues discovered.	System Test Plan describing approach to all levels of required testing. System Interface Testing plan. Data Conversion Test Plan. System Testing Corrective Action Plan. Change Management Plan. Monitor and report against each of the System Test plans identified above.
7. Cutover (go-live) Plan – In conjunction with the MCSO Project Manager, determine roll-out strategies, and contingency provisions in the event of an initially unsuccessful cutover. Communicate the cutover plan to MCSO staff and other agencies on a timely basis.	Proposed Cutover (“go-live”) plan, including contingency provisions and communication plans. Cutover task plan, resource assignments and schedule to manage and coordinate the cut over activities need to implement the replacement JMS system. Monitor and report against Cutover Task plans.
8. System and User Documentation – working with the MCSO Project Manager we will develop appropriate acceptance criteria and verify appropriate system and user documentation meet the agreed upon criteria and is in place, including such materials as	System and User Documentation Acceptance Criteria. System and User Documentation Acceptance Task plan, resource assignments and schedule to manage and coordinate the

PM Consultant Assigned Task	Expected PM Deliverable
routine system maintenance and backup/restore procedures.	review and acceptance of all documentation associated with the replacement JMS system. Monitor and report against System and User Documentation Acceptance Task plan.
9. Post Go-Live Plan – Plan includes procedures for MCSO's Help Desk, server administration, applications support, and desktop support teams. Verify MCSO staff have acquired the necessary knowledge and skills required to successfully support the new JMS on an on-going basis.	Post Go-Live Support Procedures task plan, resource assignments and schedule to manage and coordinate the post go-live support activities. Monitor and report against Post Go-Live Support Procedures task plan
10. MCSO Staff Training – Training must be provided on a "just-in-time" schedule so that knowledge transfer will not be lost prior to cutting over to the new JMS. Users are trained such that they have acquired the knowledge and skills required to successfully navigate and utilize the system and successfully perform the functions of their positions.	Acceptance criteria for "just-in-time" system training for the JMS project team and affected MCSO stakeholders. Verification that each individual received, understood and can apply the "just-in-time" training material.
11. Go-Live –Lead the project team during the cutover to the new JMS, including execution of any contingency plans that may be required until cutover is successful.	Updated Risk and Issue Logs Go Live Issue Resolution Go Live Risk Mitigation Activities Execution of Contingency Plans Weekly Status Reports
12. Post Go-Live – Lead the resolution of post go-live issues. Attend post go-live review meeting facilitated by MCSO to discuss the JMS implementation, including: a. Aspects of the project that were successful b. Aspects of the project that could/should have been done differently c. Lessons to be learned for future projects d. Any remaining project closeout issues.	Documentation of Go-Live Activities and their Outcomes. Post go-live project review meeting and project closeout.

3. Qualifications

3.1 Informatix Ability and Experience

The Professional Services Group is a recent business line added to Informatix, Inc. (Informatix) consulting service offerings that are available to our clients. Several members of the Group recently moved to Informatix from one of the big four "accounting and advisory services" national practices with the purpose of building a service environment most suited and desired by our state and local governmental practitioners. These team members bring relevant knowledge of the current landscape of solution vendors and JMS product offerings in the marketplace.

Our senior advisory professionals have worked in both the public and private sector during the long and industrious civil service and professional careers. with years of valuable skills and experiences who have served as civil service practitioners of local and state government agencies and private sector industry leaders in their respective lines of business. They have served at high-level executive and senior management positions within state of California's largest departments and policy setting agencies. Their combined years of practical experiences enables Informatix to provide our clients a comprehensive line of

service offerings such as information technology, personnel and human resources, financial accounting and fiscal affairs, legislative and policy making, and other administrative functions. Their prior experiences in delivering contract services or closely related services relevant to the scope of work for the JMS replacement project is as follows and future detailed in the resume section of this proposal.

Related Prior Experiences	Contract Service Provided	Results Achieved
1. Jail Management Replacement Project - New York City Department of Corrections	Requirements Definition Conduct Interviews and facilitate work groups sessions Vendor Solicitation and Vendor Selection Benchmark Survey of comparable law enforcement IT operations Sizing and capacity of NYC's current IT environment Project Management Verification and Validation Quality Assurance	Competed Phase 1 which included: Project Management Project Planning Schedule Maintenance Requirements Definition Requirements Traceability Matrix Comparable JMS Summary and Benchmark Software Solution Validation
2. Human Resources Business Process Improvement Project - California Department of Motor Vehicles	Document "as is" condition Conduct interviews and facilitate workshops Recommend changes to current processes Develop future "to be" state model for HR modernization Identify inherent risks and mitigation strategies along with recommendations to strengthen internal controls	Project deliverables were accepted by DMV Project Manager and Deputy Director of Administration HR implemented recommended "quick wins" to improve HR business processes

3.2 Experience Convening Stakeholders

New York City Department of Correction
Jail Management System Replacement Project
Ms. deForet, Mr. Kai, Mr. Harper and Mr. Gillgrass were members of an project team engaged to provided procurement assistance and project monitoring and quality assurances services for the City of New York, Department of Correction project to replace its legacy jail management system. The project team identified the business requirements and functional components for the new jail management system. They conducted a functionality analysis of jail management systems used by comparable sized jurisdictions and identified market place COTS JMS solutions and their capabilities. As the Functional Requirements Consultant, they provided procurement assistance by facilitating stakeholder discussions and developing the RFP-level business requirements for the Jail Management system for all functionality needed to accept, house, classify, monitor, track, transfer, discharge, and release inmates from the New York City jail system.

Department of Corrections and Rehabilitation/Prison Health Care Services
System Integrator Functional and Technical Assessment (SIFTA) services
Engagement Director
Mr. Gillgrass was the engagement director and coordinator of a team of highly technical IT professionals providing System Integrator Functional and Technical Assessment (SIFTA) services overseeing the full

development life cycle of the $450 million, statewide implementation of a Strategic Offender Management System (SOMS). This system will provide the Department with the ability to manage and access all information in digital form, pertaining to any individual that was incarcerated in the state. The SIFTA team is responsible for assessing risk and recommending modifications to all aspects of the Department of Corrections technology infrastructure to assure successful deployment and operation of this 24 X 7 statewide system.

California Department of Corrections and Rehabilitation (CDCR)
Business Information System (BIS)
Project Manager
Ms. deForet, as the Project Manager, developed the combined software and systems integrator Request for Proposal for the BIS Enterprise Resource Planning (ERP) system that will automate, integrate and standardize the CDCR business processes for financial, human resources, and supply chain management. Also developed the evaluation procedures, including scoring model to be used to evaluate both the non-cost and cost portions of the vendor proposals.

Maricopa County Sheriff's Office (MCSO)
Multiple RPF Development and Project Management Engagements
Mr. Roundy has extensive experience in requirements gathering, business analysis, system design, system integration, project management, RFP development and management and all phases of the system life cycle. Some of his highlights are the successful implementation of the MCSO Pre-booking application, Maricopa County's Common Case Number system, integrating the MCSO Inmate Fund Canteen System with an accounting system and the Arizona Disposition Reporting System.

3.3 Experience Drafting RFP Scope of Work/Requirements

California Metropolitan Transit Commission/Bay Area Toll Authority (BATA)
Information Technology Assessment, RFP Development, and Quality Assurance & Independent Verification & Validation Services
Engagement Director
Mr. Gillgrass lead a team of business and IT professionals, which included Mr. Kai, providing Infrastructure Assessment, IT Acquisition support and Quality Assurance/ Independent Verification and Validation assessment services (QA/IV&V) to the BATA in support of their decommissioning and replacement of their Automated Toll Collection and Accounting System.
Mr. Gillgrass managed a variety of consultants and participated in the following engagements in support of BATA.

- Assessment of legacy application and technology infrastructure that supported toll collecting and accounting functions on the bridges that surround San Francisco Bay
- Working with a variety of stakeholder groups, developed the RFP solicitation documents to procure a solution for the collection and accounting of tolls on all of the state bridges surrounding San Francisco Bay
- Documented how the new toll collection solution must interoperate within Metropolitan Transit Commissions IT framework
- Identified toll collection industry trends and technologies
- Defined the functional, technical and performance specifications and internal control requirements necessary to protect against fraudulent activities, within the Toll system
- Developed the vendor evaluation and scoring methodology to objectively score the bidder responses
- Transitioned team into the quality assurance oversight roll and developed and executed QA/ IV&V Project Management Plan and Software Verification Plan that describes the processes, standards, resources, tasks and timing we will used to administer these services over the full system development and deployment life cycle of the new toll collection system.

Business Analysis, Solution Scoping, Software & Vendor Selection, Enterprise Implementations and Quality Assurance
Senior Manager

During her 15 years as a consulting professional, Ms. Wolfe was a key management professional in the Public Services practice providing the full range of software life-cycle services including Business Requirements gathering; RFP preparation; Vendor/software selection; Implementation; Testing; End User Training; and Vendor Management/Quality Assurance. A sampling of Ms Wolfe clients and her responsibilities are presented below:

City of Tacoma, Washington - Served as engagement manager for the City's financial systems replacement project. The project included a needs assessment, requirements definition, RFP preparation, software/vendor evaluation, selection and contract negotiation support.

Municipality of Anchorage, Alaska - Served as engagement manager for the Municipality's financial and human resources and payroll systems replacement project. This project included a needs assessment, requirements definition, alternatives analysis, RFP preparation, software and vendor evaluation, selection, and contract negotiation support. Lori provided quality assurance during the implementation phase including reviewing and providing recommendations on vendor deliverables and change requests, submitting status reports, and providing support for executive briefings.

Seattle Housing Authority, Washington - Managed the business requirements gathering and software selection of public housing applications for the Authority. Developed a long-range strategic information system plan for the Seattle Housing Authority that included replacement of legacy software/hardware with state-of-the-art technology.

California Secretary of State (SOS)
RFP Development for California Business Connect Project,
SOS has contracted with Informatix to provide procurement consulting services for the California Business Connect Project, a $25 Million system development and integration project. Informatix' specific duties include:

Development of business and technical requirements through facilitated work sessions

Development of a request for proposal (RFP) to secure a system integration contractor, ensuring the RFP conforms to all State information technology and procurement guidelines

Prepare a Special Project Report following the selection of the contractor

Coordinate the input of State general services and information technology agencies in all phases of the procurement process

Participate in other procurement related activities, such as vendor conferences, vendor demonstrations and preparation of answers to vendor questions, as requested by the Secretary of State

Propose criteria for evaluation of

Review RFP and requirements to validate compliance with State IT procurement principles

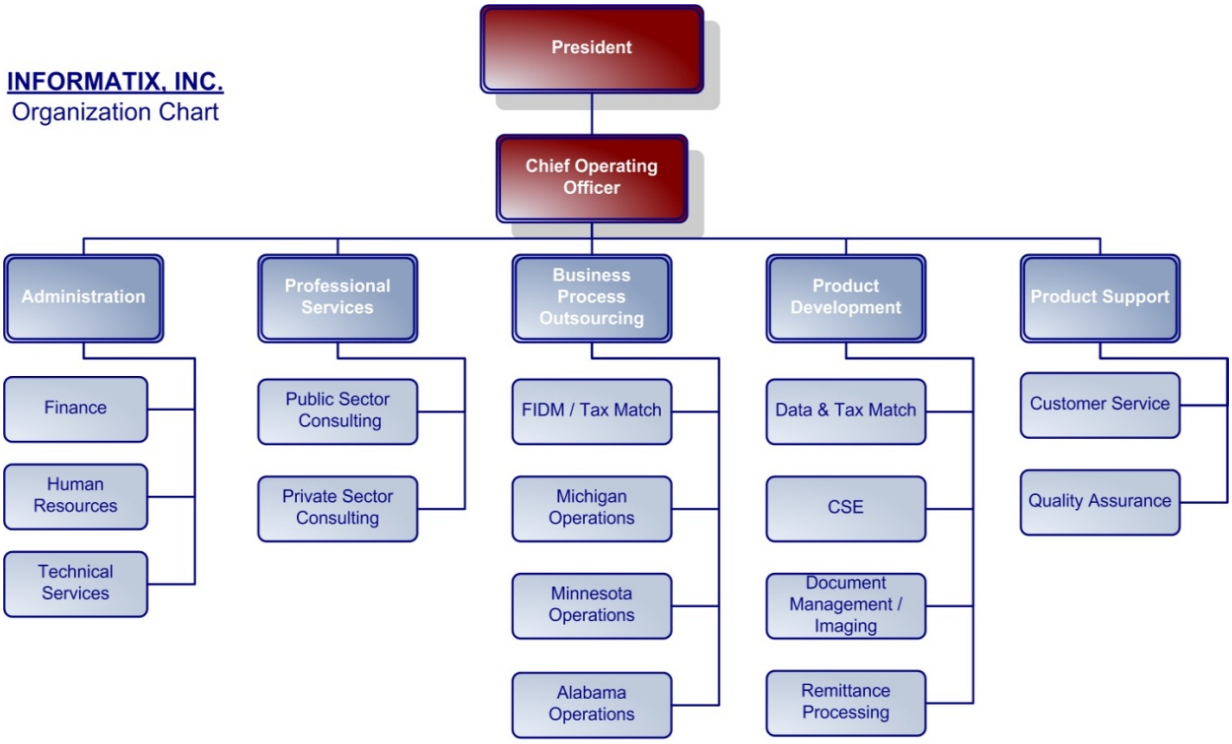
3.4 Related Experience

Administrative Office of the Courts (AOC)
Mid-Course Assessment of AOC Infrastructure Deployment
Technology Lead
Mr. Gillgrass was the lead of the technology team that performed a mid-course, statewide assessment of the agencies one billion dollar deployment of its administrative infrastructure projects. The goal of the agency initiatives was to provide essential business and technology services and applications to 400 Superior Courts in the 58 counties throughout the State. We reviewed the following initiatives and projects: Trial Court Fiscal Accountability Initiative, Trial Court Technology Initiative, Human Resources Initiative, Court Facilities Initiative, and Comprehensive Legal Services Initiative. The review focused on identifying the current status of these major initiatives, analyzing the strengths and opportunities of each initiative, assessing the governance practices employed by the agency and its contractors, and providing recommendations for mid-course adjustments, The deliverable that was prepared as a result of this

assessment provided the Judicial Council, agency and the Trial Courts with a register of current issues, risks, and opportunities associated with the their major initiatives and recommend alternative for quickly resolving issues, mitigating risks and leveraging of opportunities relating to each initiative.

3.5 Informatix Organizational Chart

Informatix company organization chart is provided on the following page.



3.6 Company Employees

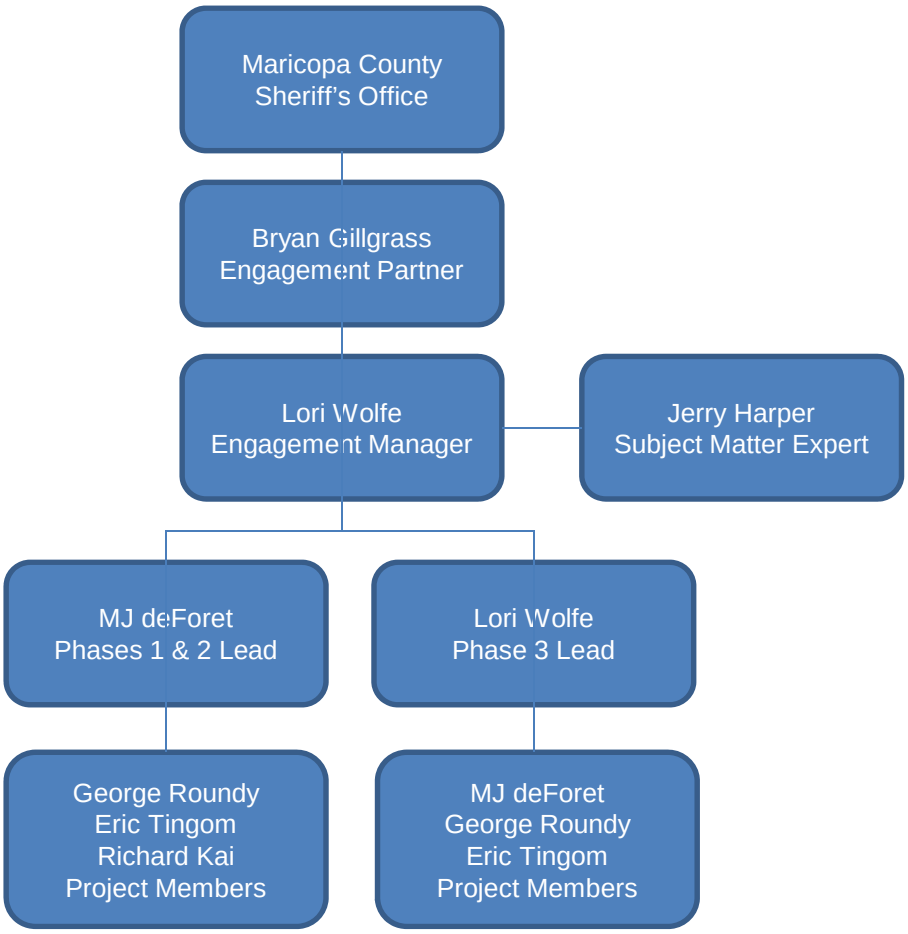
Informatix has over 170 employees, with five employees dedicated to this contract.

3.7 Staffing and Organizational Changes

Informatix has not undergone any major staffing or organizational changes in the past year.

3.8 Project Staff Organization Chart

Informatix organization chart of proposed staff is provided below.



3.9 Project Team Roles and Responsibilities

Bryan Gillgrass, Engagement Partner
Bryan Gillgrass is the Director of Professional Services with Informatix Inc. He has over 42 years of experience providing information technology advisory services, the last 24 years of which were in a variety of business and Information Technology (IT) executive management assignments in both public and private sectors. He serves as one of Informatix' primary public sector Directors delivering management and technology consulting services to State and Local Governments. Mr. Gillgrass has hands-on experience planning, managing and conducting significant organizational assessments and IT diagnostic reviews leveraging industry standards such as CoBIT, ITIL and SAS70 risk assessment; business process improvement engagements; coordinating major IT procurement efforts; and providing Project Management, Quality Assurance, and Independent Verification & Validation (QA/IV&V) services.
He has served as the Chief Information Officer for three large state departments and as a business and IT consulting practice leader for the past 12 years, with several private sector management consulting firms.

Lori Wolfe, Engagement Manager and Phase 3 Lead
Lori Wolfe has over 30 years of experience providing information technology consulting services. She has extensive hands-on experience in program/project management, business process design, requirements analysis, software selection, system design, and implementation of complex business application systems. Ms. Wolfe specializes in providing advisory and consulting services to State and Local Public Sector clients and Not-For-Profit organizations. She has a proven track record of successfully delivering large-budget enterprise-wide technical projects on time and within budgets. Lori has strong technical exposure and background and has full project life cycle experience implementing most of the major ERP and CRM systems including Oracle, SAP, PeopleSoft and Lawson. Lori is a customer-oriented consulting professional with a reputation for quality service, satisfaction and results.

Jerry Harper, Subject Matter Expert
Jerry has approximately 48 years of experience within the corrections space. This experience includes correctional/law enforcement experience at city, county and state levels. His experience included both adult and juvenile populations as well as federal detainees. He has worked in the capacity of project and team leadership with a proven ability in resolving overcrowding problems, financial crisis, averting consent degrees, implementing Jail Management Systems for classification, inmate movement including prisoner transportation and court movement, and medical and mental health delivery systems. He has a keen problem solving ability and extensive experience interfacing with governmental individuals at multiple levels including elected officials and judicial magistrates. He was responsible for the consolidation of the Municipal and Superior Courts bailiff operation into one program in the Los Angeles Sheriff's Department. Jerry has also interfaced with Judges to create appropriate programs for countywide criminal justice systems in the nation's largest court system.

MJ deforest, Phases 1 and 2 Lead
MJ deForet is an accomplished business leader with more than 20 years of experience providing strategic level business analysis, procurement, program, project and quality assurance management for a variety of technical industries.

Richard Kai, Project Team Member
Richard Kai served at several departments within the state of California's Executive and Judicial Branches for more than 35 years and worked in the private sector the past five years with one of the nation's "Big Four" accounting, tax and consulting firms. His industrial and professional experience makes him uniquely qualified to provide our clients with an assortment of program policy; budgetary; administrative, personnel and financial management; operational analysis and risk assessment services, and provide them with recommendations to improve their strategic business, technology and operational processes.

Richard managed two major statewide financial systems implementation projects during his civil service career; conducted administrative studies that assessed the effectiveness and efficacy of current and future business operations; and provided internal management and his clients with recommendations to transform their technology and administrative operations. He facilitated and led multi-discipline groups of high achieving work teams that enjoyed celebrating the accomplishments of project work teams and staff activities.

Richard served as the CYA's representative on the statewide interoperability communications task force sponsored by the Department of General Services (DGS). Mr. Kai and his law enforcement peers participated in DGS facilitated workshops designed to gather data with regards to problems and concerns with the interoperability of public safety radio systems and to identify the requirements for a statewide and/or regional telecommunications platform to serve the needs of a multitude of state and local agencies including the California Highway Patrol, county sheriff offices, city police departments, and youth and adult correctional agencies.

George Roundy, Project Team Member
George Roundy is a senior partner with eCorridor and has provided Information Systems Consulting to multiple clients, primarily in the justice and law enforcement community throughout Arizona for the last 12 years. He has over 36 years of experience delivering Information Technology leadership and solutions to clients around the world. George has led the strategic design and implementation for integrated justice solutions for Maricopa County and the State of Arizona. He has extensive experience in requirements gathering, business analysis, system design, system integration, project management, RFP development and management and all phases of the system life cycle. Some of his highlights are the successful implementation of the MCSO Pre-booking application, Maricopa County's Common Case Number system, integrating the MCSO Inmate Fund Canteen System with an accounting system and the Arizona Disposition Reporting System.

Eric Tingomm, Project Team Member
Eric Tingom is a vision-driven, senior customer-centric Project Manager and Business Analyst with proven ability to integrate the business value of innovation and technology to realize organizational goals and quantifiable operational efficiencies. Possess extensive experience in the visioning, development and implementation of integrated enterprise technology projects utilizing service oriented architecture, project management, systems design, governance and end-user assurance documentation creation. Special talents to rapidly analyze the current enterprise system then devise strategies to accommodate business objectives within required deadlines and budgets.

The primary factors that have contributed to Informatix' success include our long-term commitment to state and local government, our ability to consistently exceed expectations, and the versatility of our staff. Our reputation is one of collaboration with our clients to deliver consistently successful products and services.

3.10 Subcontracted Work

eCorridor will be assisting Informatix on this project. eCorridor is an IT consulting firm, located in Phoenix Arizona that specializes in designing and implementing solutions for integrating criminal justice agencies. Our work over the last 12 years has been primarily focused in Maricopa County and the State of Arizona.
We have worked with law enforcement, jails, prosecution, courts, public defenders and public safety agencies. Some of the agencies that eCorridor has supported include the Phoenix Police Department, Peoria Police Department, Arizona Department of Liquor, Licensing and Control, Scottsdale Police Department, Tempe Police Department, Maricopa County Sheriff's Office, Maricopa County Attorney's Office, Phoenix Prosecutors Office, Maricopa County Superior Courts, Arizona Administrative Office of the Courts, Maricopa County Public Defender's Office, Maricopa County Legal Defender, Maricopa County Legal Advocate and Arizona Department of Public Safety.

eCorridor has worked closely with Maricopa County Integrated Criminal Justice Information Systems (ICJIS) and the Arizona Criminal Justice Commission (ACJC) to design and implement local and national standards for information sharing between agencies.

George Roundy has over 10 years of experience convening stakeholders from the state, county and municipal level on multiple large scale system development and implementation projects including the Arizona Disposition Reporting System, MCSO PreBooking application, Arizona Department of Liquor Licensing and Control's enterprise licensing application, Maricopa County Attorney's Office CAIS application and the Maricopa County Public Defenders IRIS application. While these projects were not Jail Management Systems, they dealt with the flow of criminal justice information throughout Maricopa County and the State of Arizona and they provide a solid basis for contributing to the successful implementation of Maricopa County Sheriff's Office new Jail Management System.

George Roundy has worked on many projects that included the creation of RFP scope and work requirements as well as developing selection and evaluation criteria throughout his career. While with EDS, George led the RFP development and vendor selection and evaluation for new reservation and operational systems for Utell Corporation and Ryder Truck Rental. More recently, through his work with eCorridor, George led the RFP development and vendor selection for the Arizona Department of Liquor Licensing and Control for their enterprise licensing application (ELIS) and for the Maricopa County Sheriff's Office in their selection and implementation of an Inmate Trust Fund Accounting System.

Eric Tingom has over 18 years of experience working with stakeholders from federal, tribal, state, county and municipal level complex and large scale systems in business analysis, requirements development, system acquisition and project implementation. Eric's most recent experience has been with the California Disposition Reporting Improvement Project, Arizona Disposition Reporting System, Arizona Statewide Arrest Warrant Process, County of Santa Clara Defense Case Management System Replacement, County of Santa Clara Silicon Valley Regional Interoperability Authority Data Exchange (Cad2Cad/CROP), and the County of Santa Clara Law and Justice System Roadmap. Eric's extensive experience in large scale requirements, business process changes and complex system acquisitions has been leveraged by multiple organizations both in the identification of a proper solution as well as successful implementations.

Eric Tingom has worked on numerous projects that included all aspects of the full procurement process from Request for Information, Request for Quotes and Request for Proposals throughout his career. Within the last two years Eric has acted as the lead in the requirements development, marketplace analysis, procurement placement, evaluations process, and vendor selection to contract negotiations. Most recently, Eric has lead the RFI development of a Defense Case Management system with a Board Recommendation being developed and a successful Request for Proposal for a Computer Aided Dispatch to Computer Aided Dispatch integration project that resulted in a successful contract.

4. Disclosures

4.1 Financial Rating

Informatix' Dun and Bradstreet (D&B) rating, dated September 24, 2012 is 1R2. "1R" is 10 or more employees. "2" is good. The "1R" ratings category reflects the company size based on the total number of employees for the business. The "2" ratings category is a creditworthiness indicator based on analysis by D&B of public filings, trade payments, business age and other important factors. "2" is the highest Composite Credit Appraisal that a company not supplying D&B with current financial information can receive.

4.2 Previous Maricopa County Work

Informatix has not performed any work previously for the Maricopa County Sheriff's Office.

Our proposed subcontractor for this project, eCorridor, has previously worked with the Maricopa County Sheriff's Office and other Maricopa County governmental organizations on the following system development and implementation projects including: the Arizona Disposition Reporting System, MCSO PreBooking application, Arizona Department of Liquor Licensing and Control's enterprise licensing application, Maricopa County Attorney's Office CAIS application and the Maricopa County Public Defenders IRIS application.

4.3 Legal Proceeding Disclosures

Informatix has not been involved in any legal proceedings, lawsuits or governmental regulatory actions and any contractual demands for assurance in the last seven years.

Informatix has not been convicted of, or had a civil judgment rendered in the last seven years.

4.4 Performance Deficiencies

Informatix has not had any performance deficiencies, notices to cure, failure to perform or terminations for cause or default in the past seven years.

EXHIBIT E

VENDOR BEFO

November 21, 2012

Paul Aguilar
Maricopa County
Office of Procurement Services
320 West Lincoln Street
Phoenix, Arizona 85003-2494

Re: RFP Number – 12112 MCSO Jail Management System (JMS) Consultant/Project Manager

Dear Mr. Aguilar;

Informatix Inc. is pleased to provide our Best and Final Offer (BAFO) for the RFP 12112 – MCSO Jail Management System Consultant/Project Manager. We have provided the revised Attachment A on the following pages, as requested by the County.

In order to provide this BAFO, we have identified the following assumptions:

- During the requirements development phase, MCSO will provide access to subject matter expertise (SME) from each of the business areas that will be impacted by the new JMS system.
- The SME's will assist the project team in developing the "As Is" descriptions of each of the impacted business areas
- During the requirements development phase 1, MSCO will provide SME's who are familiar with the existing enabling technologies
- During the requirements development phase 1, MSCO will provide SME's who are familiar with the existing interface technologies
- During the requirements development phase 1, MSCO will provide SME's who are familiar with the existing report generation technologies
- During the RFP development phase 2, MSCO will provide procurement support staff that is familiar with MCSO's procurement processes and practices
- During the RFP development phase 2, MSCO will provide procurement support team to assist with the finalizing the RFP
- During the RFP development phase 2, MSCO will provide procurement evaluation team that is assigned to support the vendor evaluation process.
- During the System Implementation phase 3, MSCO will provide access to and or assign business and technical staff to support each of the tasks assigned directly to the Project Manager/Consultant, via this RFP.
- Informatix and MSCO will collectively review and validate the Project's work plan, approach, resource requirements and objectives at the conclusion of major milestones and each phase. Adjustments to the work plan, schedule, resource plans and contract will be made as appropriate.

Informatix is excited about the potential opportunity to work with the County on this important project. Please contact me at 916 830-1692 if you have any questions or need further information.

Sincerely,

Michele Blanc
Informatix Inc.

See EXHIBIT A and B for Best and Final Offer (BAFO) pricing and schedule

EXHIBIT F

OFFICE OF PROCUREMENT SERVICES CONTRACTOR TRAVEL AND PER DIEM POLICY

1.0 All contract-related travel plans and arrangements shall be prior-approved by the County Contract Administrator.

2.0 Lodging, per diem and incidental expenses incurred in performance of Maricopa County/Special District (County) contracts shall be reimbursed based on current U.S. General Services Administration (GSA) domestic per diem rates for Phoenix, Arizona. Contractors must access the following internet site to determine rates (no exceptions): www.gsa.gov

2.1 Additional incidental expenses (i.e., telephone, fax, internet and copying charges) shall not be reimbursed. They should be included in the contractor's hourly rate as an overhead charge.

2.2 The County will not (under no circumstances) reimburse for Contractor guest lodging, per diem or incidentals.

3.0 Commercial air travel shall be reimbursed as follows:

3.1 Coach airfare will be reimbursed by the County. Business class airfare may be allowed only when preapproved in writing by the County Contract Administrator as a result of the business need of the County when there is no lower fare available.

3.2 The lowest direct flight airfare rate from the Contractors assigned duty post (pre-defined at the time of contract signing) will be reimbursed. Under no circumstances will the County reimburse for airfares related to transportation to or from an alternate site.

3.3 The County will not (under no circumstances) reimburse for Contractor guest commercial air travel.

4.0 Rental vehicles may only be used if such use would result in an overall reduction in the total cost of the trip, <u>not for the personal convenience of the traveler</u>. Multiple vehicles for the same set of travelers for the same travel period will not be permitted without prior written approval by the County Contract Administrator.

4.1 Purchase of comprehensive and collision liability insurance shall be at the expense of the contractor. The County will not reimburse contractor if the contractor chooses to purchase these coverage.

4.2 Rental vehicles are restricted to sub-compact, compact or mid-size sedans unless a larger vehicle is necessary for cost efficiency due to the number of travelers. (NOTE: contractors shall obtain pre-approval in writing from the County Contract Administrator prior to rental of a larger vehicle.)

4.3 County will reimburse for parking expenses if free, public parking is not available within a reasonable distance of the place of County business. All opportunities must be exhausted prior to securing parking that incurs costs for the County. Opportunities to be reviewed are the DASH; shuttles, etc. that can transport the contractor to and from County buildings with minimal costs.

4.4 County will reimburse for the lowest rate, long-term uncovered (e.g. covered or enclosed parking will not be reimbursed) airport parking only if it is less expensive than shuttle service to and from the airport.

4.5 The County will not (under no circumstances) reimburse the Contractor for guest vehicle rental(s) or other any transportation costs.

5.0 Contractor is responsible for all costs not directly related to the travel except those that have been pre-approved by the County Contract Administrator. These costs include (but not limited to) the following:

in-room movies, valet service, valet parking, laundry service, costs associated with storing luggage at a hotel, fuel costs associated with non-County activities, tips that exceed the per diem allowance, health club fees, and entertainment costs. Claims for unauthorized travel expenses will not be honored and are not reimbursable.

6.0 Travel and per diem expenses shall be capped at 15% of project price unless otherwise specified in individual contracts

IN WITNESS WHEREOF, this Contract is executed on the date set forth above.

CONTRACTOR

Michele Blanc

AUTHORIZED SIGNATURE

Michele Blanc

PRINTED NAME AND TITLE

1740 Creekside Oaks Dr. Suite 175, Sacramento, CA 95833

ADDRESS

12/27/12

DATE

MARICOPA COUNTY

CHIEF PROCUREMENT OFFICER,
OFFICE OF PROCUREMENT SERVICES

DATE

~ OR ~

CHAIRMAN, BOARD OF SUPERVISORS

FEB 13 2013

DATE

ATTESTED:

CLERK OF THE BOARD 0123/13

FEB 13 2013

DATE

APPROVED AS TO FORM:

LEGAL COUNSEL

2/13/13

DATE

DEPUTY MARICOPA COUNTY ATTORNEY