



**Superior Court of California
County of Santa Clara**

**REQUEST FOR INFORMATION
#102709D**

Minute Order Form Automation Project

Responses Must Be Received

**No Later Than 5:00 pm Pacific Standard Time
December 4, 2009**

RESPONSES WILL NOT BE ACCEPTED AFTER THIS DATE AND TIME

**Postmarks Are Not Acceptable
No Exceptions**

Table of Contents

1. INTRODUCTION 3

1.1 ISSUING BODY 3

1.2 RFI LAYOUT AND SECTIONS..... 3

1.3 PROJECT OVERVIEW 3

2. REQUIREMENTS 3

2.1 PROJECT DESCRIPTION 3

2.2 PROJECT REQUIREMENTS 3

3. SUBMISSION INFORMATION 4

3.1 RESPONSE FORMAT 4

3.2 SCHEDULE OF EVENTS 5

3.3 SUBMISSION INSTRUCTIONS..... 5

3.4 RESPONSE PREPARATION COSTS 6

3.5 CONTACT INFORMATION..... 6

3.6 CONFIDENTIAL OR PROPRIETARY INFORMATION 6

1. INTRODUCTION

1.1 Issuing Body

The Superior Court of California, County of Santa Clara (Court) is issuing a Request for Information (RFI) to investigate potential solutions to help the Court automate its Minute Order forms.

1.2 RFI Layout and Sections

This RFI is laid out in sections as follows:

1. Introduction
2. Requirements
3. Submission Information

1.3 Project Overview

The current Minute Order forms are multiple part "carbon" paper forms. The Court Clerks need to press down hard when writing to make sure the information is captured on all parts and is legible. This often leads to ergonomic issues and injuries such as carpal tunnel syndrome. We would like to identify a solution so that the Minute Order forms can be filled out electronically and distributed automatically to the appropriated destinations. The solution is intended to reduce potential worker compensation claims due to carpal tunnel, reduce paper waste, distribute electronic forms to appropriate destinations faster, and allow clerks to fill forms quickly and easily without any change in their current process. This RFI is issued for information and planning purposes only and does not constitute a solicitation. Responses to the RFI will not be returned. A response to this RFI is not an offer and cannot be accepted by the Court to form a binding contract. Upon completion of the RFI process, the Court may elect to issue a formal bid for potential solutions.

2. REQUIREMENTS

2.1 Project Description

Provide a solution based on the digital pen technology or equivalent to electronically capture data written on paper forms and automatically distribute them to appropriate departments and agencies.

2.2 Project Requirements

The Court is requesting information from vendors that have proven experience in providing a solution to capture data electronically using digital pen and plain paper. The requirements for the solution are:

Priority	Capability
Must	Ability to "mail merge" data into form prior to printing
Must	Ability to correct data after upload
Must	Ability to OCR alphanumeric input and checkboxes
Must	Ability to fill out multiple forms simultaneously while retaining data integrity
Must	Associate filled out form with external data record
Must	Dock pen and upload form for preview within 5 seconds
Must	Highlight form without affecting data input

Must	Ignore writing on pre-defined parts of the form
Must	Pen charge lasts five (5) days without charge
Must	Programmatic access/interface to backend data management system or database
Must	Save form as TIFF, PDF
Desired	Form modifications can be done by the customer without engaging vendor
Desired	Ability to add "post-it" note to form
Desired	Distribute form after upload via email
Desired	Retain/encode "mail merge" data on form prior to upload
Desired	Use back of pen to erase

3. SUBMISSION INFORMATION

3.1 Response Format

Your response will be submitted to the Court. Please use the information contained in this document and the format requested as the basis for your response. Listed below is an outline for the responses to this RFI. This outline is intended to minimize the effort of the respondent and structure the responses for ease of analysis by the Court.

Section 1: Overview of the Company

The Court requires the vendor to be a reputable company of strong financial standing experience in digital pen and forms technology. The vendor's proposal must provide the information requested below. If the proposer is a joint venture, information about the prime subcontractor and the Subcontractor must be submitted separately. The information to be provided is as follows:

- a. Complete name and address.
- b. Federal tax identification number. Note that if a sole proprietorship using its social security number is awarded a contract, the social security number will be required prior to finalizing a contract.
- c. If incorporated state in which incorporated
- d. A short narrative description of the vendor's organization, including organization charts and indication of company officers where applicable.
- e. Principal type of business and operating model (e.g. hardware/software manufacturer, integrator, value-added reseller, etc).
- f. Total number of years in business.
- g. Number of years providing products and services similar in size and scope to those requested in this RFI.
- h. If subcontractors are proposed for this RFI, describe the vendor's contract management process for subcontractors included in the vendor's proposal and provide copies of signed

Section 2: Experience and Capability

The Court requires the vendor and its subcontractors to have prior experience in all aspects of the products and services described in this RFI for customers similar to or with relevance in the size, complexity and scope of this RFI. Vendor shall:

- Describe the vendor's experience as it pertains to providing products and services similar in size, complexity and scope to those required under this RFI and in the manner required pursuant to this RFI.

- Provide the names, addresses, and telephone numbers for a minimum of three (3) customers for whom the vendor has provided similar products and services
- within the last 18 months. The vendor should include a brief description of the scope of products and services provided to the customer and the duration of the contract.

The Court may contact some or all of the references provided in order to determine the vendor's performance record. The Court reserves the right to contact references other than those provided in the proposal and to use the information gained from them in the evaluation process.

Section 3: Technical Approach and Methodology

Vendor shall provide a summary that describes how the vendor intends to provide the requested products and services. The description shall include, but is not limited to, the following:

- Ability to satisfy technical requirements
- Account Team structure and role including description of sales contact process,
- Account Team support, and periodic account review process
- Communication process with the Court
- Training (initial and ongoing)
- Time Schedule
- Program Evaluation

3.2 Schedule of Events

The Court has developed the following list of key events. All deadlines are subject to change at the discretion of Court. Once the submissions have been evaluated, the Court will select a subset of the vendors to be invited to demonstrate their solution to the Court. The duration of the demonstration will be limited to a maximum of two hours.

No.	EVENTS	KEY DATES
1	Issue RFI	Nov 2, 2009
2	Pre-submission Vendor Conference	Nov 9, 2009
3	Responses Due – Date and Time	Dec 4, 2009 before 5:00 p.m. PST
4	Review of responses and selection of vendors for demonstration	Dec 18, 2009
5	On-site demonstration/presentation	Jan 11, 2010 – Jan 15, 2010

3.3 Submission Instructions

The RFI and any addenda that may be issued will be available on the Court website: www.sccsuperiorcourt.org. Please submit your responses via email, U.S. Mail or fax to the following addresses. Email responses must be submitted in Microsoft Word format. If you are sending your responses via U.S. Mail or courier please send five (5) copies.

E Mail: beyerman@scscourt.org
Subject: Minute Order Form Automation Project –
Company Name

U.S. Mail or Courier: Attention: Beth Eyerman,
Information Services Bureau,
Superior Court of California, County of Santa Clara
191 North First Street
San Jose, CA 95113
beyerman@scscourt.org

Fax: Attention: Beth Eyerman,
Subject: Minute Order Form Automation Project –
Company Name
408-324-5325

3.4 Response Preparation Costs

Responders are solely responsible for all expenses associated with responding, demonstration, and communication with regard to this RFI. There is no express or implied obligation by the Court to reimburse a responder for any costs incurred in preparing or submitting responses, providing additional information when requested by the Court, participating in any product demonstrations, or communications with the Court.

3.5 Contact Information

All questions must be directed via email to Zing Nguyen (znguyen@scscourt.org) with the Subject: Minute Order Form Automation Project – insert your company name.

3.6 Confidential Or Proprietary Information

The Court's policy is to follow the intent of the California Public Records Act (PRA). If the information submitted contains material noted or marked as confidential and/or proprietary that, in the Court's sole opinion, meets the disclosure exemption requirements of the PRA, then that information will not be disclosed pursuant to a request for public documents. If the Court does not consider such material to be exempt from disclosure under the PRA, the material will be made available to the public, regardless of the notation or markings. If a firm is unsure if its confidential and/or proprietary material meets the disclosure exemption requirements of the PRA, then it should not include such information in its response.