



Superior Court of California, County of San Francisco Procurement Department

RFP 38-25-002-IT (Projects Consultant)

TO: IT Consultant Companies
FROM: Superior Court of California, County of San Francisco, Procurement Department

RFP ISSUE DATE: February 27, 2026
SUBJECT: Request for Proposal RFP #38-25-002-IT (Projects Consultant)

ACTION REQUESTED: You are invited to review and respond to the RFP.
This is a fully electronic RFP process, including electronic submission of quotes.

The RFP includes:

- DESCRIPTION AND RFP TIMELINE
- INSTRUCTIONS FOR SUBMITTING PROPOSALS
- PROVISIONS
- EVALUATION CRITERIA
- ATTACHMENT 1a—Acceptance of Terms & Conditions
- ATTACHMENT 1b—Standard IT Agreement Terms & Conditions
- ATTACHMENT 2—General Certifications
- ATTACHMENT 3—DARFUR Contracting Act Certification
- ATTACHMENT 4--UNRUH Civil Rights Act and California Fair Employment and Housing Act Certification
- ATTACHMENT 5—Payee Data Record
- APPENDIX A – STATEMENT OF WORK
- EXHIBIT 1—Cost Proposal Template (Excel is separate document)
- EXHIBIT 2—References Template (Excel is separate document)

**IT IS A VIOLATION OF THIS COMPETITIVE PROCESS TO CONTACT COURT
PERSONNEL ABOUT THIS RFP.**
SUBMIT QUESTIONS, INQUIRIES, AND DOCUMENTS TO: solicitationsmailbox@sftc.org

DESCRIPTION AND RFP TIMELINE

1. BRIEF DESCRIPTION:

- A. The San Francisco Superior Court ("Court" or "JBE") IT Department invites proposals from qualified vendors to furnish professional information technology consulting and implementation services to support the planning, design, migration, modernization, and operational stabilization of critical enterprise systems and infrastructure.
- B. The vendor will provide dedicated project management and IT project services.
- C. The selected proposer should have substantial past experience providing IT modernization, infrastructure transformation, and cybersecurity services demonstrating the ability to manage multi-phase migrations, legacy system remediation, and cloud-based implementations with minimal operational disruption. Prior experience with the public sector is a plus.
- D. The RFP may include an elimination round and if so, after an initial evaluation only those invited to continue will be considered in the final round.

2. PERIOD OF PERFORMANCE (Estimated start date):

The contract is anticipated to start June 1, 2026 and run for one year with three 1-year options to extend.

RFP TIMELINE

The following estimated timeline is provided for proposer’s general information. None of the dates are binding upon the Court:

EVENT	DATE & TIME <i>(all times are Pacific Time)</i>
RFP Issued	2/27/26
Deadline for Submission of Questions	3/13/26 by 3:00 p.m.
FAQs posted on Court procurement web page	Approximately 3/20/26
Deadline for Submission of Round 1 Proposals <i>(Late submissions will not be accepted.)</i>	3/24/26 by 3:00 p.m.
Interviews – if any (by invitation only)	Approx April 13-15, 2026
Deadline for Submission of Round 2 Proposals (if applicable) <i>(Late submissions will not be accepted.)</i>	Within 48 hours after interview date and time
Notice of Intent to Award	Approximately 5/1/26
START DATE OF SERVICES	Approximately June 1, 2026

INSTRUCTIONS FOR SUBMITTING PROPOSALS

The following are the instructions for submitting a Proposal in response to this RFP. Failure to follow instructions, include attachments, or have technical difficulties may result in disqualification. Proposals should provide straightforward, concise information that satisfies the requirements of this RFP. Any Proposer who is disqualified will be notified via email as soon as this disqualification is discovered.

1. Round 1 OED Review: All proposals will firstly be evaluated by an Omissions, Errors, and Defects (OED) review. Proposers could be disqualified during this review and will be notified as soon as disqualification is determined—a determination solely made by the Court.
2. Round 1 Technical Proposal Evaluation: The Evaluation Team will review and score each proposal that was not disqualified.
3. Interviews: The top scoring proposals (min of 3) may be invited to an interview by the Evaluation Team. The purpose of an interview is to gain a better understanding of the Proposers' qualifications for the anticipated IT projects (if the Court deems this better understanding to be necessary). The Court may not conduct interviews.
 - 3.1 If interview sessions are conducted, Proposers may be asked to submit an updated Technical proposal (Round 2 Proposal);
 - 3.3 If one Proposer that was interviewed is allowed to re-submit Technical Proposal then all Proposers that were interviewed will be allowed.
4. Round 2 Proposal Evaluation: If Proposers allowed to submit updated Technical Proposal, then the technical proposal scores may be updated by the Evaluation Team.
5. Cost Proposal Evaluation: Cost proposals are input into a template that uses a formula to produce a score. The template scores the costs against all the Proposers. The Evaluation Team does not see the cost scores until after the final technical scores.
6. Final Score: A final score emerges when the final scores from the Technical Proposal and Cost Proposal are input into the formulated scoring template.
7. Solicitations eMail Box: Only submit questions, inquiries, documents to solicitationsmailbox@sftc.org. Answers to questions will be compiled in a FAQ document and posted on the Court's website. When submitting a question about the RFP, the email subject line to state the following: "QUESTIONS RFP 38-25-002-IT (your company name)." Questions will only be entertained up to the Questions deadline. After that, questions will be ignored.
8. Tax Delinquency: Pursuant to PCC 10295.4, a Judicial Branch Entity, in this case, the Court, shall not enter into any contract with a person or entity identified by the Franchise Tax Board (FTB) or the Board of Equalization (BOE) as one of the 500 largest tax delinquents. Proposer must certify that it is not on either delinquency list. This certification shall be made on Attachment 3 'General Certifications.'
9. Proposals: Proposals must only be submitted by authorized personnel with the owner/president/CEO of the business **copied on the email and identified in the body of the email as the authorized person with the person's title**. All proposal submissions should only

be sent via email to solicitationsmailbox@sftc.org by the submission deadline. Email subject line to state the following: "PROPOSALS RFP 38-25-002-IT (your company name)."

10. Proposals should be submitted in one email and contain both the Technical Proposal and Cost Proposal as attachments. If the files are too large, it is permitted to submit more than one email, HOWEVER, the subject line should include the number emails (i.e. "1 of 2," "2 of 2"). Example: "PROPOSALS RFP 38-25-002-IT (your company name) email 1 of 2."
11. File format of all documents only in PDF except for provided templates which must remain in Excel with formulas included (no manual calculations).

12. **Cost Proposal.**

- 12.1 The Cost Proposal will become part of an issued contract and the rates cannot change in the first three years.
- 12.2 The Excel Cost Template must be used and submitted as an Excel file and must have all yellow fields filled.
 - A. If there is no cost for any line item, input \$0.00.
 - B. Include any discounts offered in the comments box.
 - C. In the blue section:
 - i. Acknowledgement and acceptance that payments made by the Court are fulfilled through a Purchase Order—not credit card, ACH, or wire.
 - ii. Acknowledgement and acceptance that the Court will not prepay for services.
 - iii. Acknowledgement and acceptance that no payment will be made for any services not rendered.
 - iv. Expiration date of Quote but no less than 90 days from last Cost Proposal deadline.
 - v. Signature, date, printed name, and title. Signature must be signed and not printed or typed and signed by authorized person to submit a binding quote.

13. **Technical Proposal.**

- 13.1 The Technical Proposal will become part of the contract (if a contract is issued)
- 13.2 Technical Proposal must include the following **AS SEPARATE PAGES WITH TITLES:**
 - A. Title: Business Name and Federal ID Number (FEIN). (Include your company's name and FEIN.)
 - B. Title: Business Owner Information. (Include Business owner's name, address, phone, and email address.)
 - C. Title: SF Business License. (Include a copy of current License to conduct business

in San Francisco or proof of application.)

- D. Title: Proof of Solvency. (Include financial statements and mark 'Confidential' if you are not a publicly traded entity.) Note: no other documents are acceptable for proof of solvency. Failure to submit financial statements may result in proposer deemed non-responsive and participation in RFP will end. Proof of solvency documents are NOT included in the contract.
- E. Title: Qualifications and Experience. (Provide a summary of your organization's qualifications and experience, including success stories relevant to our Statement of Work (SOW). Focus on examples where you delivered solutions for similar industries or government institutions and name the organizations, dates of your service, and contract amount.
- F. Title: Description of Team. (Provide job titles and descriptions and experience of the Project Manager and support staff. **Do not include photos, names of staff, or resumes.** Include a detailed description of how your team will function to deliver on the SOWs and include their roles. Attach flowcharts, diagrams, or visual representations of how the team functions, if applicable. Include your approach to backfilling key personnel in the event of resource unavailability and ensuring continuity of service.)
- G. Title: Communication. (Describe your communication methods.)
- H. Title: Issue Management (Describe in detail how the Court would contact you when issues arise. Refer to Appendix F in Attachment 1b for provisions and definitions that will be included in the agreement. This section of the Technical Proposal is meant to include *additional* information and not replace or revise Appendix F.)

Include in your details about issue management:
 - i. response approach (expectations around communication and updates)
 - ii. resolution approach (service level escalation procedures)
 - iii. collaboration during issue resolution including handling of Client escalation.
 - iv. Description of response during after-hours
- I. Title: Security Incident Handling. (Describe procedures for identifying, reporting, and remediating data security incidents or breaches, including post-incident communication.)
- J. Title: Service Continuity: (Describe how you ensure continuity in the face of tool/platform downtime or infrastructure disruptions.)
- K. Title: Proactive Issue Mitigation: (Describe strategies you use to detect and prevent issues before they impact deliverables or timelines.)

14. References: Using the Excel References Template, provide ten (10) years business references,

i.e., businesses that can give feedback based on their experience with your services. References should include the company name and address; Manager contact name, title, phone number, and email address; whether or not the services were performed in San Francisco. Also indicate the dates of services, the total contract amount for those dates, and a brief list of the services you performed. Although there are only three references to be included, those three should total 10 years and if not, give explanation in box as to why does not amount to 10 years. Submit the Template in Excel format. (The Court's current vendor is excluded from submitting references.)

15. Provide all documents and information requested throughout this RFP.
16. Check your email often for communication from the Solicitations email box.
17. A confirmation email will be sent when proposal received. If you have not received a confirmation email within two (2) hours (during working hours) of submission, proposal may not have been received, and a follow-up submission should be sent via email but in time to meet the deadline.
18. Technical glitches will not excuse late submission regardless of why or fault.
19. We highly recommend submitting earlier than the deadline.

OFFER PERIOD

A Proposer's proposal is an irrevocable offer for ninety (90) days following the proposal due date. In the event a final contract has not been awarded within this period, the Court reserves the right to negotiate extensions to this period.

EVALUATION OF PROPOSALS

At the time proposals are opened, each proposal will be checked for the presence or absence of the required proposal contents by the Omissions Errors and Defects (OED) Team. Proposer will be notified immediately if disqualified for any omissions, errors, or defects.

The OED Team will pass along qualifying proposals to the Evaluation Team. The Evaluation Team will evaluate the proposals on a 100-point scale using the criteria set forth in the table below.

Cost Proposals are scored after the Technical Proposals are scored and a formula is used to reveal a cost score against all the Cost Proposals. The cost scores are added to the Technical scores for a final, total score for each Proposer.

Award, if made, will firstly be offered to the highest-scored proposal.

The Court reserves the right to negotiate a better cost during the contracting period.

The Court will post a Notice of Intent to Award at <https://sf.courts.ca.gov/general-information/purchasing-contracting>. Once there is a fully executed agreement, the Court will post a Notice of Award. The Court is under no obligation to award a contract to any Proposer.

PROVISIONS

1. Payment by the Court, if any, for goods and services will be through issuance of a check against a Purchase Order after invoice processed. No advance payment for services. No payments using Court credit card.
2. It is unlawful for any person engaged in business within the State of California to sell or use any article or product as a “loss leader” as defined in section 17030 of the Business and Professions Code.
3. The Court is under no obligation to sign an agreement with any Proposer for any service.
4. The Court may cancel this RFP at any time for no reason.
5. Proposer should not include proprietary information in their proposals or during an interview (if there is an interview). The Court will not be financially responsible to Proposer and shall not be prohibited from developing or using products, concepts, codes, scripts, systems, or techniques that are similar to or compete with Proposer’s proprietary information. Any such development will be construed as purely coincidental.
6. Before contracting with the Court, the Proposer agrees to undergo a Third-Party Risk Assessment conducted by the Court or the Judicial Council of California.
7. The Proposer must ensure that key points of contact for the project team are located onshore and are available for on-site presence upon the Court's request. Other team members may be located on-shore, off-shore, or near-shore; however, the majority of the team must maintain working hours that overlap with the Court’s days and hours of operation.
8. Ultimately the Court expects to have visibility into, and a participatory role in, screening the profiles of the individuals who will comprise the project team. The Proposer shall not limit interaction solely to the Point of Contact; instead, the Court shall have a say in the selection, onboarding, or offboarding of any particular members of the project team.
9. The Proposer must possess a valid United States Tax Identification Number.
10. Contracted vendors are required to undergo background checks, at the cost and discretion of the Court, and use the Court’s vendor.
11. No costs incurred by Proposer to participate in this solicitation will be reimbursed by the Court.

EVALUATION CRITERIA

During Round 1, the Evaluation Team will review and score proposals that were not disqualified using the criteria set forth in the table below. If there is a Round 2 evaluation, then scores may be adjusted from the initial score. An award, if any, may be made to the Highest Scoring Proposer.

CRITERION	POINTS
Relevant Experience & Past Performance	25%
Technical Approach & Methodology	20%
Cybersecurity, Cloud, and Case Management Expertise	15%
Dedicated project team and Qualifications	15%
Cost to the Court	15%
Acceptance of Terms & Conditions*	10%
TOTAL	100

**Acceptance of Terms & Conditions as is will receive the 10 points. A Proposer may be deemed 'non-responsive' if any material changes are proposed--a determination made solely by the Court.*

INTERVIEWS

The Court may conduct interviews with Proposers to clarify aspects set forth in their proposals or to assist in finalizing the ranking of top-ranked proposals. Interviews will be conducted online. The Court will only notify eligible Proposers regarding interview arrangements. The Court will not reimburse Proposers for any costs incurred in interview participation. The Court may not be able to accommodate any Proposer that has technical difficulty either entering the interview or during the interview. Recording during the interview is not allowed. AI tools are not allowed and includes, but is not limited to, AI note taking or AI summarization. Recording or use of AI tools may deem the Proposer as disqualified.

CONFIDENTIAL OR PROPRIETARY INFORMATION

Each proposal will be retained by the Court and will become a public record. California judicial branch entities are subject to rule 10.500 of the California Rule of Court that governs public access to judicial administrative records (https://www.courts.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10_500).

If information submitted in a proposal contains material noted or marked as confidential and/or proprietary that, in the Court's sole opinion, meets the disclosure exemption requirements of Rule 10.500, then that information will not be disclosed upon a request for access to such records nor will it be included in the contract. If the Court finds or reasonably believes that the material so marked is **not** exempt from disclosure, the Court will disclose the information regardless of the marking or notation seeking confidential treatment.

Notwithstanding the above, the California Public Contract Code requires the public inspection of certain proposals. If required to do so by the Public Contract Code, a Court may disclose all information contained in a proposal, including information marked as confidential or proprietary.

PROTESTS

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract Manual (see <http://www.courts.ca.gov/documents/jbcl-manual.pdf>). Failure of a Proposer to comply with the protest procedures set forth in that chapter will render a protest inadequate and non-responsive and will result in rejection of the protest. The deadline for the Court to receive a solicitation specifications protest is the proposal due date. Protests should only be emailed to: solicitationsmailbox@sftc.org and include in subject line (with RFP number filled in): "PROTEST RFP-38-2x-xxx (your company name)."

DO NOT CONTACT ANYONE AT THE COURT REGARDING THIS PROCUREMENT. CONTACTING SOMEONE AT THE COURT ABOUT THIS PROCUREMENT CAN RESULT IN DISQUALIFICATION. ALL INQUIRIES SHOULD BE SENT TO solicitationsmailbox@sftc.org

ATTACHMENT 1a

ACCEPTANCE OF TERMS & CONDITIONS

Instructions: Mark the appropriate choice below and sign this attachment.

1. Proposer accepts Attachment 1b “Appendix D--Standard Terms & Conditions and Definitions” and “Appendix E—Support Services” without exception. (10 points)

OR

2. Proposer proposes exceptions or changes to Attachment 1b. Proposer must also submit (i) a red-lined version (Track Changes turned on) of Attachment 1b that implements all proposed changes, and (ii) a written explanation or rationale in the form of Comments within Attachment 1b for each exception or proposed change ALONG WITH the benefit to the Court for the change. (If no benefit to the Court, state ‘No benefit to the Court.’) Any material exception (addition, deletion, or other modification) to the Court’s terms and conditions may render a Proposer as nonresponsive. The Court, in its sole discretion, will determine what constitutes a material exception. The Court also has the right to strike any suggested change and if unacceptable to Proposer, Court will move to the next highest Proposer.

Email solicitationsmailbox@sftc.org and request a Word version for markup. (zero points)

BY (Authorized Signature) 
PRINTED NAME OF PERSON SIGNING
TITLE OF PERSON SIGNING

ATTACHMENT 1b

STANDARD AGREEMENT TERMS & CONDITIONS

1. Ask for Word version if including markup. Remember to refer to Attachment 1a for what is required in markup.
2. Attached as separate PDF.

END OF ATTACHMENT 1b

ATTACHMENT 2 GENERAL CERTIFICATIONS

Check the box below, if agreed, and sign this attachment. Please note that the Judicial Branch Entity (JBE) will reject a proposal from a Proposer that does not indicate acceptance of these clauses.

Conflict of Interest. Proposer has no interest that would constitute a conflict of interest under California Public Contract Code (PCC) sections 10365.5, 10410 or 10411; Government Code sections 1090 et seq. or 87100 et seq.; or California Rules of Court, rule 10.103 or 10.104, which restrict employees and former employees from contracting with judicial branch entities.

Suspension or Debarment. Proposer certifies that neither Proposer nor any of Proposer’s intended subcontractors is on the California Department of General Services’ list of firms and persons that have been suspended or debarred from contracting with the state because of a violation of PCC 10115.10, regarding disabled veteran business enterprises.

Tax Delinquency. Proposer certifies that it is not on either (i) the California Franchise Tax Board’s list of 500 largest state income tax delinquencies, or (ii) the California Board of Equalization’s list of 500 largest delinquent sales and use tax accounts.

Contract Dispute or Litigation. Proposer certifies that it is not currently in a contract dispute for same or similar services at a California Trial Court.

Check box to indicate acceptance of the clauses above.

These certifications must be updated and resubmitted to the JBE solicitations email box if any status changes during the course of the RFP up to full execution of a contract (if any); and if in contract with the JBE, must be resubmitted during contract term if there is a change in status.

PROPOSER COMPANY NAME	FEDERAL ID NUMBER
BY (<i>Authorized Signature</i>) 	
PRINTED NAME OF PERSON SIGNING	
TITLE OF PERSON SIGNING	
DATE	

ATTACHMENT 3

DARFUR CONTRACTING ACT CERTIFICATION

DARFUR CONTRACTING ACT CERTIFICATION

Pursuant to Public Contract Code (PCC) section 10478, if a proposer currently or within the previous three years has had business activities or other operations outside of the United States, it must either (i) certify that it is not a “scrutinized company” as defined in PCC 10476, or (ii) receive written permission from the Judicial Council to submit a proposal.

To submit a proposal to the Judicial Branch Entity (JBE), the proposer must insert its company name and Federal ID Number below and complete **ONLY ONE** of the following three paragraphs. To complete paragraph 1 or 2, simply check the corresponding box. To complete paragraph 3, check the corresponding box **and** complete the certification for paragraph 3.

If you do not have (or haven't had within the past three years, any business activities that qualify under this PCC, then fill form, check box #1, and submit to the JBE.

<i>Company Name (Printed)</i>	<i>Federal ID Number</i>
<i>Printed Name and Title of Person Checking Box (for paragraph 1 or 2 below)</i>	

1. We do not currently have, and we have not had within the previous three years, business activities or other operations outside of the United States.

OR

2. We are a “scrutinized company” as defined in PCC 10476, but we have received written permission from the Judicial Council of California to submit a proposal pursuant to PCC 10477(b). *A copy of the written permission Judicial Council of California is included with our proposal.*

OR

3. We currently have, or we have had within the previous three years, business activities or other operations outside of the United States, but we **certify below** that we are not a “scrutinized company” as defined in PCC 10476.

CERTIFICATION FOR PARAGRAPH 3:

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY, that I am duly authorized to legally bind the proposer to the clause in paragraph 3. This certification is made under the laws of the State of California.

<i>Company Name (Printed)</i>	<i>Federal ID Number</i>
<i>By (Authorized Signature)</i>	
<i>Printed Name and Title of Person Signing</i>	
<i>Date Executed</i>	<i>Executed in the County of _____</i> <i>in the State of _____</i>

END OF ATTACHMENT 3

ATTACHMENT 4

UNRUH CIVIL RIGHTS ACT AND CALIFORNIA FAIR EMPLOYMENT AND HOUSING ACT CERTIFICATION

UNRUH CIVIL RIGHTS ACT AND CALIFORNIA FAIR EMPLOYMENT AND HOUSING ACT CERTIFICATION

Pursuant to Public Contract Code (PCC) section 2010, the following certifications must be provided when (i) submitting a bid or proposal to the JBE for a solicitation of goods or services of \$100,000 or more, or (ii) entering into or renewing a contract with the JBE for the purchase of goods or services of \$100,000 or more.

CERTIFICATIONS:

1. We are in compliance with the Unruh Civil Rights Act (Section 51 of the Civil Code);
2. We are in compliance with the California Fair Employment and Housing Act (Chapter 7 (commencing with Section 12960) of Part 2.8 of Division 3 of the Title 2 of the Government Code); **and**
3. We do not have any policy against any sovereign nation or peoples recognized by the government of the United States, including, but not limited to, the nation and people of Israel, that is used to discriminate in violation of the Unruh Civil Rights Act (Section 51 of the Civil Code) or the California Fair Employment and Housing Act (Chapter 7 (commencing with Section 12960) of Part 2.8 of Division 3 of Title 2 of the Government Code).

The certifications made in this document are made under penalty of perjury under the laws of the State of California. I, the official named below, certify that I am duly authorized to legally bind the proposer/bidder/vendor to certifications made in this document.

<i>Company Name (Printed)</i>		<i>Federal ID Number</i>
<i>By (Authorized Signature)</i>		
<i>Printed Name and Title of Person Signing</i>		
<i>Date Executed</i>	<i>Executed in the County of _____ in the State of _____</i>	

ATTACHMENT 4

ATTACHMENT 5 PAYEE DATA RECORD

PAYEE DATA RECORD Required in lieu of IRS W-9 form when receiving payments from the Judicial Council of California (JCC) on behalf of the Superior Courts of California Revised 09/15/2025			
1	Instructions See page two for additional instructional information and Privacy Statement. Complete all information on this form, sign, and date. Prompt return of this fully completed form will prevent delays when processing payments. Information provided in this form will be used to prepare Information Returns (1099). Return this form to your court representative who will forward it to the Judicial Council of California.		
SECTIONS 2 THRU 5 – VENDOR COMPLETE			
2	Legal Name PAYEE'S LEGAL NAME - AS SHOWN ON FEDERAL INCOME TAX RETURN		
	BUSINESS NAME - IF DIFFERENT FROM ABOVE	E-MAIL ADDRESS	
	REMITTANCE MAILING ADDRESS		
	CITY, STATE, ZIP CODE		
	PHONE NUMBER		
3	Payee Entity Type Complete One Box Only NOTE: A taxpayer identification number is required ENTER FEDERAL EMPLOYER IDENTIFICATION NUMBER (FEIN) <input type="checkbox"/> PARTNERSHIP <input type="checkbox"/> CORPORATION <input type="checkbox"/> EXEMPT (NON-PROFIT) <input type="checkbox"/> LIMITED LIABILITY COMPANY <input type="checkbox"/> CORPORATION – LEGAL <input type="checkbox"/> GOVERNMENT (FEDERAL, STATE, LOCAL) <input type="checkbox"/> INDIVIDUAL/SOLE PROPRIETOR <input type="checkbox"/> CORPORATION – MEDICAL <input type="checkbox"/> ESTATE OR TRUST		
4	Resident Status check the appropriate box <input type="checkbox"/> California Resident - Qualified to do business in California or maintains place of business <input type="checkbox"/> California Nonresident (see page 2) – Payment(s) to non-resident for services may be subject to State Income Tax withholding. <input type="checkbox"/> No services performed in California <input type="checkbox"/> Copy of Franchise Tax Board waiver of State Withholding attached		
5	Certification Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding because of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and 3. I am a U.S. citizen or other U.S. person, as defined by the IRS. I hereby certify under the penalty of perjury that the information provided on this document is true and correct. Should my information change, I will promptly notify the JCC at the address listed in Section 1.		
Vendor Contact Information and Signature	VENDOR REPRESENTATIVE'S NAME (Type or Print)	TITLE	E-MAIL
	AUTHORIZED VENDOR SIGNATURE	DATE	TELEPHONE
SECTION 6 – COURT COMPLETE			
6	Vendor Category Please choose from the JCC Vendor Category below <input type="checkbox"/> ARBITRATOR <input type="checkbox"/> COURT REPORTER RETIREE – (SELECT TYPE BELOW) <input type="checkbox"/> BENEFIT PROVIDER <input type="checkbox"/> DECEASED FINAL PAYMENT <input type="checkbox"/> MEDICAL PREMIUM REIMB <input checked="" type="checkbox"/> CONTRACTOR <input type="checkbox"/> EMPLOYEE <input type="checkbox"/> IN LIEU OF MEDICAL PREMIUM <input type="checkbox"/> COURT APPT. COUNSEL <input type="checkbox"/> GARNISHMENT TRUSTEE <input type="checkbox"/> PENSION REPLACEMENT <input type="checkbox"/> COURT INTERPRETER <input type="checkbox"/> GRAND JURY <input type="checkbox"/> MEDIATOR <input type="checkbox"/> SETTLEMENT/ AWARDS <input type="checkbox"/> RENT <input type="checkbox"/> VOLUNTEER		
	Court Contact	COURT CONTACT NAME	PHONE NUMBER

Requirement to Complete Payee Data Record	
<i>A completed Payee Data Record (in lieu of the IRS W-9) is required for payments and will be kept on file at the Judicial Council of California, Trial Court Administrative Services Office. Since each state agency with which you do business must have a separate Payee Data Record on file, it is possible for a payee to receive a similar form from various state agencies.</i>	
SECTIONS 2 THRU 5 – VENDOR COMPLETE	
2	<p>Enter the payee’s legal name. Sole proprietorships must also include the owner’s full name.</p> <p>An individual must list his/her legal name as it appears on his/her Federal Income tax return. If a different name is used, that name should also be entered, beneath the legal name.</p> <p>The mailing address should be the address at which the payee chooses to receive correspondence. The business address is the physical location of business, if different than mailing address. The phone number, e-mail address, and facsimile number should also be provided.</p>
3	<p>Check the box that corresponds to the payee business type. Check only one box. Corporations must check the box that identifies the type of corporation.</p> <p>The State of California requires that all parties entering into business transactions that may lead to payment(s) from the State provide their Taxpayer Identification Number (TIN). The TIN is required by the California Revenue and Taxation Code Section 18646 to facilitate tax compliance enforcement activities and the preparation of Form 1099 and other information returns as required by the Internal Revenue Code Section 6109(a).</p> <p>The TIN for individuals is their Social Security Number (SSN). A sole proprietor may have both a Federal Employer Identification Number (FEIN) and a SSN, the IRS prefers that sole proprietors use their SSN. Only partnerships, estates, trusts, and corporations will enter their FEIN.</p>
4	<p>Are you a California resident or non-resident?</p> <p>A corporation will be defined as a “resident” if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.</p> <p>A partnership is considered a resident partnership if it has a permanent place of business in California.</p> <p>An estate is a resident if the decedent was a California resident at the time of death.</p> <p>A trust is a resident if at least one trustee is a California resident.</p> <p>For individuals and sole proprietors, the term “resident” includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a non-resident.</p> <p>Payments to all non-residents may be subject to withholding. Non-resident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for State income taxes. However, no withholding is required if total payments to the payee are \$1,500 or less for the calendar year.</p> <p>For information on Non-resident Withholding, contact the Franchise Tax Board at the numbers listed below: Withholding Services and Compliance Section: 1-888-792-4900 E-mail address: wscs.gen@ftb.ca.gov For hearing impaired with TDD, call: 1-800-822-6268 Website: www.ftb.ca.gov</p>
5	<p><u>This form must be signed.</u> Provide the name, title, e-mail, and telephone number of the individual completing this form. Also, provide the date the form was completed.</p> <p><u>Certification Instructions:</u> You must cross out item 2 if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. If you are not a U.S. Citizen or U.S. person, as defined by the Internal Revenue Service, a different form may be required and tax withholdings may apply. See IRS website http://www.irs.gov/businesses/international/index.html for additional information.</p>
SECTION 6 – COURT COMPLETE	
6	<p>Please check the box that best describes the type of business/work the vendor provides. This will assist us in processing payment and tax withholdings. If the court is sending the request, please include contact information to assist with processing your request. Not including court contact information may delay processing the request.</p>
<p>Privacy Statement: Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, State, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it. It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and State law imposes non-compliance penalties of up to \$20,000. You have the right to access records containing your personal information, such as your SSN. To exercise the right, please contact the business services unit or the accounts payable unit of the state agency(ies) with which you transact that business.</p>	

END OF ATTACHMENT 5

APPENDIX A

STATEMENT OF WORK

- I. This Statement of Work will be included in the Contract.
- II. All projects or only parts of a project may be deployed by the Court. Contracted cost may be reduced if project reduced or not deployed.
- III. All completed work is subject to the satisfaction and approval of the Court, per Appendix D, Section 2 ‘Delivery, Acceptance, and Payment.’
- IV. Contractor Responsibilities
 - A. Contractor responsible for the scope of work within each of the projects listed below.
 - B. Contractor will be given a timeline to complete each project or project phase but all deployed projects in general are completed within one year.
 - C. **SYSTEM PROJECTS AND ENHANCEMENTS:**
 1. CISCO PHONE TO MS TEAMS VOIP MIGRATION (PHASE 2)
 - a) Analyze existing Cisco call flows, phone extensions, and device inventory
 - b) Configure Teams Phone routing, policies, and call queues
 - c) Migrate phone numbers, voicemails, and user profiles into Teams
 - d) Deploy Teams-compatible desk phones and calling peripherals
 - e) Conduct staged departmental cutovers to minimize disruption
 - f) Optimize call quality and validate network performance
 - g) Provider user training, communication, and adoption support
 - h) Project Management and documentations
 2. AT&T IVR MIGRATION
 - a) Work with application teams to advise on infrastructure implications of various new Interactive Voice Response (IVR) solutions
 - b) Support infrastructure in AWS, Azure, or On-prem for new IVR solution to the most appropriate solution
 - c) Build servers or cloud instances
 - d) Install software if necessary
 - e) Test and troubleshoot
 - f) Project management and documentations
 3. PC IMAGE DEPLOYMENT PROJECT (WDS TO TANIUUM DEPLOY)
 - a) Document existing WDS imaging workflows and dependencies
 - b) Create a modern Windows image using Tanium Deploy
 - c) Automate application packaging and configuration baselines
 - d) Replace WDS task sequences with scalable deployment templates
 - e) Test deployment across all supported hardware models
 - f) Implement security baselines and compliance standards

- g) Train IT staff on updated deployment processes
 - h) Project Management and documentations
4. SHAREPOINT MIGRATION AND N DRIVE DECOMMISSION
- a) Inventory file shares, permissions, and folder structures
 - b) Design SharePoint information architecture and governance
 - c) Migrate content from N-Drives into SharePoint libraries
 - d) Rebuild permissions using least-privilege principles
 - e) Train users on SharePoint collaboration tools
 - f) Configure metadata, retention policies, and search enhancement
 - g) Validate migrated content and decommission N-Drives
 - h) Project Management and documentations
5. CLOUD MIGRATION OF ON-PREM SERVERS TO AWS (PHASE 1)
- a) Assess all servers on premises and assess all application dependencies
 - b) Design a cloud migration strategy for each workload
 - c) Build a secure AWS landing zone including VPC, IAM, and logging
 - d) Migrate initial priority systems using AWS migration tools
 - e) Validate performance, data integrity, and application workflows
 - f) Configure cloud monitoring, backups, and operational visibility
 - g) Provide cutover support and early-life stabilization
 - h) Project Management and documentations
6. CLOUD MIGRATION TO AWS (PHASE 2)
- a) Optimize cloud compute, storage, and networking for performance and cost
 - b) Implement automation for patching, backups, and routine operations
 - c) Refactor selected applications into cloud-native architectures
 - d) Enhance disaster recovery and replication capabilities
 - e) Harden IAM, boundary protections, and cloud security controls
 - f) Apply tagging, governance, and compliance configurations
 - g) Develop cloud operations runbooks for IT staff
 - h) Project Management and documentations
7. CITRIX TO AWS APPSTREAM 2.0 MIGRATION
- a) Identify all applications currently delivered through Citrix
 - b) Build AppStream images, fleets, and scaling configuration
 - c) Integrate AppStream with identity, networking, and storage systems
 - d) Publish and test applications in the AppStream streaming environment
 - e) Conduct pilot testing and performance optimization
 - f) Roll out AppStream access to departments and end users
 - g) Decommission or consolidate Citrix infrastructure components

- h) Project Management and documentations
- 8. Move Privileged Access Management away from CyberArk
 - a) Identify and propose alternatives to CyberArk given our actual use cases
 - i. Password vault
 - ii. Automatic password rotation
 - b) Develop a project plan to migrate existing passwords to the new system.
 - c) Migrate the passwords and user accounts to the new system
 - d) Project Management and documentations
- 9. Migrate from Infoblox to Microsoft for DNS/DHCP
 - a) Architect a solution
 - b) Project plan
 - c) Build and test new servers
 - d) Migrate to new servers
 - e) Project Management and documentations

D. CASE MANAGEMENT SYSTEM & LEGACY APPLICATION:

- 1. LEGACY APPLICATION MODERNIZATION INITIATIVE
 - a) Inventory legacy applications including IJS, Dissomaster, Essential Forms and CMS2000
 - b) Document workflows, data structures, and system interfaces
 - c) Assess modernization readiness, compatibility gaps, and risk areas
 - d) Develop modernization roadmaps for each application
 - e) Validate applications on modern OS and infrastructure platforms
 - f) Collaborate with Court IT Unit on remediation or compatibility updates
 - g) Prepare migration frameworks for long-term modernization
 - h) Project Management and documentations
- 2. VMS VIRTUAL PLATFORM UPGRADE, MAINTENANCE, SUPPORT
 - a) Assess current VMS hardware, storage, and workflow dependencies
 - b) Virtualize VMS servers and reorganize storage for optimal performance
 - c) Reconfigure DMVB integration pathways and validation logic
 - d) Implement improved redundancy and backup strategies
 - e) Migrate VMS workloads with minimal user disruption
 - f) Validate indexing, playback, and export workflows
 - g) Provide stabilization support and updated documentation
 - h) Project Management and documentations
- 3. FACILITATION OF THE MIGRATION OF JUVENILE CMS ('JCMS') TO A NEW CMS (PHASE 1)
 - a) Document JCMS workflows, data structures, and integration points
 - b) Coordinate with CMS vendor to define migration architecture

- c) Prepare datasets for extraction, cleansing, and transformation
 - d) Support interface updates affecting DMV and VMS integration
 - e) Conduct validation testing and resolve data issues
 - f) Assist departments with process readiness and user transitions
 - g) Establish governance structure for multi-year migration activities
 - h) Project Management and documentations
4. MIGRATION INCLUDING DMS MIGRATION OF CIVIL CMS TO A NEW CMS (PHASE 1)
- a) Assess CIVIL CMS workflows, document repositories, and data dependencies
 - b) Define the extraction and transformation strategy for DMS content
 - c) Perform initial data migration batches into new CMS vendor environments
 - d) Validate case workflows and user access models
 - e) Support multi-cycle testing and data corrections
 - f) Document dependencies and integration workflows
 - g) Prepare roadmap for phased migration completion
 - h) Project Management and documentations
5. C-TRACK TO NEW CMS DATA MIGRATION FACILITATION (PHASE 1)
- a) Validate mapping between C-Track datasets (criminal database) and new CMS schema
 - b) Assist vendor with data normalization and transformation
 - c) Prepare integration updates aligning C-Track workflows with new CMS requirements
 - d) Support user acceptance testing and data validation
 - e) Create archival plan for legacy C-Track records
 - f) Coordinate cutover activities with multiple vendors
 - g) Document new workflows and system dependencies
 - h) Project Management and documentations
6. C-TRACK OS MIGRATION FROM REDHAT TO ORACLE LINUX 9
- a) Catalog all Linux servers running unsupported versions of Linux
 - b) Work with the application owner to plan an upgrade to the appropriate version of Oracle Linux for that application. Including:
 - i. Choosing the correct Oracle Linux for each component of the application
 - ii. Staging and Schedule
 - iii. Test plans
 - c) Perform the upgrade to Oracle Linux as soon as feasible.
 - i. Build servers
 - ii. Install software
 - iii. Test and troubleshoot
 - d) Project Management and documentations

7. JAMF CLEANUP AND APPLE DEVICE ONBOARDING PROJECT
 - a) Audit current JAMF configurations, profiles, and device inventory
 - b) Remove outdated, conflicting, or redundant policies
 - c) Standardize enrollment workflows for macOS and iOS devices
 - d) Onboard unmanaged Apple devices into JAMF
 - e) Integrate JAMF with Microsoft Entra ID for identity and compliance
 - f) Implement automate patching and software deployment
 - g) Train IT staff on new processes and best practices
 - h) Project Management and documentations
8. PRINTERLOGIC COST OPTIMIZATION AND SECURITY PROJECT
 - a) Inventory current printers, print volumes, and cost drivers
 - b) Deploy PrinterLogic cloud print management platform
 - c) Configure secure badge release and print workflow optimization
 - d) Standardize and consolidate print drivers and queues
 - e) Implement print analytics and cost-reduction policies
 - f) Migrate all users to cloud-managed printing workflows
 - g) Provide administrator and user training
 - h) Project Management and documentations

E. NETWORK, SECURITY and SYSTEM (On-Prem and Off-Prem)

1. ENTERPRISE NETWORK SEGMENTATION PROJECT
 - a) Assess current network segmentation and traffic flows
 - b) Define security zones for applications, devices, and users
 - c) Reconfigure firewalls, VLANs, and routing to enforce segmentation
 - d) Implement micro-segmentation controls in critical environments
 - e) Validate segmentation impact on performance and workflows
 - f) Roll out segmentation changes in phased deployments
 - g) Document final architecture and provide IT staff training
 - h) Project Management and documentations
2. CLOUD SECURITY POSTURE MANAGMEENT ROLLOUT
 - a) Deploy CSPM tooling across AWS and Microsoft environments
 - b) Configure continuous compliance scanning and risk detection
 - c) Implement automated remediation policies and guardrails
 - d) Integrate CSPM alerts into existing SIEM platforms
 - e) Perform cloud security posture assessment and gap analysis
 - f) Train IT and security teams on CSPM dashboards and workflows
 - g) Document governance model for ongoing cloud compliance
 - h) Project Management and documentations

3. PENETRATION TESTING INITIATIVE
 - a) Define penetration testing scope for internal, external, and application testing
 - b) Execute manual and automated penetration testing activities
 - c) Validate discovered vulnerabilities and exploitation potential
 - d) Produce prioritized remediation recommendations
 - e) Execute retesting cycles after remediation is applied
 - f) Deliver technical and executive-level reporting
 - g) Provide roadmap for ongoing improvements to the Court security posture
 - h) Project Management and documentations
4. CROSS-SYSTEM LOGGING AND SIEM ENHANCEMENT
 - a) Assess current logging sources, retention policies, and visibility gaps
 - b) Centralize system logs into a unified SIEM environment
 - c) Configure correlation rules, dashboards, and real-time alerts
 - d) Integrate logs from AWS, VMS, AppStream, Entra ID, and endpoints
 - e) Test alert accuracy and refine detection use cases
 - f) Train IT and security teams on monitoring workflows
 - g) Document incident response processes aligned with SIEM capabilities
 - h) Project Management and documentations
5. SERVER AND STORAGE HARDWARE REFRESH
 - a) Assess current server and storage hardware lifecycle and utilization
 - b) Install new server and storage platforms
 - c) Migrate workloads onto refreshed infrastructure
 - d) Optimize redundancy, performance, and storage tiering
 - e) Validate backup, replication, and DR configurations
 - f) Document new architecture and operational procedure
 - g) Decommission legacy hardware and reclaim resources
 - h) Project Management and documentations
6. LOW VOLTAGE NETWORK CABLING PROJECT (PHASE 3)
 - a) Conduct site survey to document existing cabling and determine drop locations
 - b) Install new CAT7 cabling and patch panels
 - c) Label and document all new and existing network ports
 - d) Perform cable certification and performance testing
 - e) Update network diagrams and infrastructure documents
 - f) Coordinate installation with facilities and department schedules
 - g) Deliver final documentation and certification reports
 - h) Project Management and documentations

7. VMWARE REPLACEMENT
 - a) Propose a new platform to manage Virtual Machines
 - b) Develop a project plan
 - c) Deployment of new VM system
 - d) Migrate existing VMs to new platform
 - e) Testing and troubleshooting
 - f) Project Management and documentations
8. FIREWALL REPLACEMENT
 - a) Create a project plan
 - b) Discover all current uses of firewalls
 - c) Develop a new architecture for our firewall system
 - d) Analyze current applications, determine minimum required access for each application
 - e) Craft firewall rules that meet those requirements
 - f) Deploy applications
 - g) Project Management and documentations
9. IDENTITY MANAGEMENT
 - a) Create a project plan
 - b) Document our processes related to Identity management
 - c) Propose tools for automating our identity processes
 - d) Develop automated workflows for managing users as they are added, removed, and change their roles.
 - e) Implement these workflows
 - f) Project Management and documentations

END OF APPENDIX A

EXHIBIT 1
COST PROPOSAL TEMPLATE

(USE EXCEL FORM PROVIDED WITH THIS RFP)

END OF EXHIBIT 1

EXHIBIT 2
References Template

(USE EXCEL FORM PROVIDED WITH THIS RFP)

End of Exhibit 2

END OF RFP