

**RFP 17-03 Appellate Court Management System (CMS)
Vendors' Conference
January 4, 2018
Arizona State Courts Building
1501 W. Washington, Phoenix, Arizona 85007
Conference Room 119, 9:00 a.m.**

Panel/Presenters:

Janet Johnson, Clerk of the Court
Arizona Supreme Court

Brett Watson, Procurement Officer
Arizona Supreme Court

Tisha Lavy, Appellate Tech. Service Coord.
Arizona Supreme Court

Amy Wood, Clerk of the Court
Arizona Court of Appeals, Division One

Patsy Lestikow, Appellate Tech. Service Coord.
Arizona Court of Appeals, Division One

Administrative Office of the Courts Staff Present:

Jennifer Greene

Brenda Lee Dominguez

Vendors Present:

Shawn Moser, Journal Technologies

Megan O'Leary, Tyler Technologies

WebEx Vendor Participants:

Norm Anderson, Tybera Development

Dallas Powell, Tybera Development

Jessica Hipskind, MST Solutions

Stephen Martin, FEI Systems

Eric Penny, Vertiba

Eric Scully, Visionary Integration Professionals

SaraBeth Ray, Thomson Reuters Court Management Solutions

Manoj Jain, Thomson Reuters Court Management Solutions

Jamison Sarno, Thomson Reuters Court Management Solutions

Christopher Percy, Thomson Reuters Court Management Solutions

Dave Johnson, Thomson Reuters Court Management Solutions

I. Introduction – 9:00 a.m.

Brett Watson opened the conference and introductions of all attendees were made.

II. Background and Vendor Questions (Amy Wood)

Amy Wood provided background information on the three phases of the program, pricing, and structure of the specifications and opened the floor for questions.

Question #1:

Which system does the Court of Appeals Division Two currently use?

Answer:

Court of Appeals Division Two uses an in-house, home grown system which was built using newer technology. Replacing the system used by the Supreme Court and the Court of Appeals Division One is more pressing. Division Two is not encompassed in this effort.

Question #2:

Do you anticipate Court of Appeals Division Two joining within the next three years or would it be an entirely different life cycle?

Answer:

We expect Court of Appeals Division Two would be an entirely different life cycle.

Question #3:

What is the anticipated time period for Phase I and Phase II? How long have you given for the phases?

Answer:

We are looking to the proposals to lay this out for Phase I. In our minds, we are probably thinking of it as maybe somewhere around 6 months, plus or minus some time. We have not given thought to the timeframe for Phase II as it will naturally flow as a result of Phase I and what it will truly take to address the gaps.

Question #4:

Will there be time during Phase II to come look at multiple possible solutions to address gaps, some of which may be able to be addressed with the current solution at no cost and some for which there would be a cost?

Answer:

[Point of Clarification following the conference. This question was asked regarding Phase II, but answered in terms of Phase I. It is expected that the answer does apply to Phase I, not Phase II]. Yes, Phase I is expected to be collaborative in finding potential solutions to address the gaps. Phase II will involve will involve any development needed to address remaining gaps.

Question #5:

I have reviewed the RFP and added up staff identified, and have approximated that there could be 100 end users. Do you have an approximate number of end users for the Supreme Court and the Court of Appeals Division One for licensing purposes?

Answer:

There are approximately 100 end users at the Court of Appeals Division One and 75 at the Arizona Supreme Court. Total ballpark of 175 end users.

Question #6:

I'm curious, was there any external assistance in preparing the requirements of this RFP or looking at business processes? If so, who were they.

Answer:

The Arizona Administrative Office of the Courts supports the current system. The Administrative Office of the Courts, Supreme Court and Court of Appeals staff worked together to create the RFP document. There was no external vendor assistance.

Question #7:

Eric Scully – Was benchmarking done against other states or other government agencies regarding what solutions they were using?

Answer:

Yes, to a degree. We have had conversations with appellate courts in other states regarding the solutions they are using or endeavoring to use over the last number of years in anticipation of reaching this point where we have to replace our system. We have had our ears open, but have not actively sought information regarding other government solutions.

Question #8:

Have you funded this project as a whole or in phases?

Answer:

We are seeking funding through the Legislature for the project as a whole.

Question #9:

What is the budget or max number for vendors for the project?

Answer:

We have asked the legislature for funding, but we have also been very open about the fact that we need to go through this procurement process. We are looking to the proposals to identify costs.

Question #10:

Will the demonstration be recorded or is it only for the live presentation?

Answer:

The conference is being recorded and will be posted in its entirety on the Arizona Judicial Branch procurement website.

Reminder that all questions are due to Brett Watson by February 9th and that vendors should visit the Arizona Judicial Branch procurement website often for updates, date changes or amendments.

III. Demonstration Introduction (Janet Johnson)

Introduction of Patsy Lestikow and Tisha Lavy.

IV. Existing CMS Demonstration

Patsy and Lestikow and Tisha Lavy provided demonstrations of the current CMS being used.

IV. Questions Following the Demonstration

Question #1.

What document management system do you use?

Answer: OnBase

Question #2.

How do you “Verify”?

Answer:

Using the “verify” button is a human process of indicating that the address has been verified by the user that clicks the button. This may have been done through making a phone call, reviewing a document or some other means of determining that the address is accurate.

Question #3

Are you requiring the use of OnBase or are you open to using another document management system provided by a vendor?

Answer:

We are fairly wedded to OnBase as a document management system as it is the standard for the state Judiciary. Additionally, all of our existing documents are already indexed within OnBase.

V. Closing (Brett Watson)

Thank you all for attending.

The deadline to submit questions to Brett Watson is February 9, 2018.