STATE OF MARYLAND JUDICIARY
Administrative Office of the Courts
REQUEST FOR PROPOSALS (RFP)
Project Name: iMIS Management Support and Training
Project # 7615

This procurement is being conducted as a Small Procurement as described in the Judiciary Procurement Policy, not to exceed $25,000.

Overview
The Maryland Judiciary's Mediation and Conflict Resolution Office (MACRO) uses the iMIS 20-300 online platform, cloud hosted by ASI, to manage its Maryland Program for Mediator Excellence (MPME) membership program. The website for this program has been live since August of 2016, and can be found at www.mpmeonline.org

Purpose
The Administrative Office of the Courts (AOC) issues this Request for Proposals (RFP) as with the experience of using the website for the past year, we have recognized the need for additional training for our staff members who manage the site, as well as management support for the site itself.

1. **Scope of Work / Consultant/Management Support Services**

   We are seeking the services of a certified iMIS Consultant:

   - Provide timely (within one business day) on-going support for our two staff members when problems arise with the website and when additional instruction is needed – (such as refreshers, help with new iMIS features as they are released).

   - Assist the staff with ensuring the compatibility of new iMIS releases with the customizations that are built into the MPME's iMIS website (such as publicly searchable mediator directory for members who have chosen to be listed and randomization of search results from public use of the mediator directory). Work directly with ASI when new updates are not immediately compatible to ensure the smooth and continuous functionality of the MPME website.

   - Assist staff with data management and display configuration

o Manage and add new data in user defined tables and member data, such as adding new case type categories for mediator (member) profile to be displayed on public directory; converting current date categories into newly defined searchable fields using IQAs.

o Build advanced search option for the public using the online mediator directory. This would include expanding the search parameters using both existing data, such as years of experience, and case sub-type, as well as any new categories added in 3A above.

- Correct the custom randomization search results feature in the Online Directory of Mediators. The directory includes a listing of all MPME members who have indicated that they are able to take cases and want to be listed on the publicly searchable directory. The public can currently search the directory by county and general case type. The results of their search are presented to them in random order so that no one mediator is always at the top of the list. In its present form, the random list has to be shown all on one page (lots of scrolling), because if it is divided into multiple pages, the search parameters will re-randomize the entire search when the public user moves to the next page or moves back a page. We would like to correct this so that public users can search for mediators, see results in sets of 10, 25, 50 or all, and have the search results remain the same as the user moves to the next page. (*Immediately below in italics is the description of Directory Randomization Customization Requirements that was used by the company that created the feature.)

*"Development to provide Randomization of Directory Results Tasks Included:

1. Create SQL View that generates a new GUID for each row in the result set
2. Work with ASI to get the SQL View applied to the MACRO database
3. Create Business Object based on new view
4. Add New Business Object to both MACRO Directory searches
5. Change the default sort order based on GUID value returned

Above professional services are based on following requirements:

Functional Requirements:

MACRO MPME Randomization of Online Directory Search Results Display Description:
- When website visitors search the online directory of members, the results of the search, regardless of which filters are used to create the search, will display in random order each time a search is run.

Maintenance:

- *The randomization feature will be created using ASI iMIS software and will remain compatible with all future patches, upgrades and versions of iMIS software.*

- *General site maintenance, including serving as a liaison between MACRO staff and ASI for SMR tickets and website errors."*

2. Scope of Work / Training

We are seeking the services of a certified iMIS Trainer and prefer in-person hands-on training using our data tables and website, but some training can be web-based using video chat and screen sharing technologies.

- Fully utilizing the registration process for events – for both members and non-members.

- Fully utilizing the Resource Library feature, including how to post things so that members can view them without requiring users to immediately download the documents in order to view them.

- Fully utilizing the Communities feature, including:

  o Setting the amount of notices that users receive – such as, daily digest, weekly, or other options.

  o Changing the subject line for notices so users know what the topic or a posting is right away.

- Posting documents to the website, including:

  o Ability for staff to upload and post videos to the website – such as short how-to videos.

  o Ability for applicants to upload their own training certificate of attendance with their membership application. (Currently applicants send the certificate as an email attachment to staff.)

  o Ability for existing members to be able to upload continuing education certificates into their own profile.

  o Adding new fields into the database/data table. [Work with selected consultant in the first year. Prepare staff to be able to make these updates in the future.

- Ability for staff to add new fields as new information or categories are needed.

- Creating the ability for the public to search the online directory by additional existing fields.

  o Currently the public can search for a mediator by County and by top-level case type categories – such family or business. We would like to add the ability for the public to search for a mediator by sub-type, such as child-access or home improvement. Sub-types already exist in the database, and members have already included this information in their profile.

- Ability to send emails to the entire membership (~1500 members) all at once without requiring to chunk emails into multiple groups.

- Calendar of events features:

  o Posting multi-day events and have them appear as a recurring daily, e.g. 8 am to 4:30 pm Mon., Tues., and Wed. (24 hours of training), instead of appearing as 8 am on Mon. through 4:30 pm on Wed. This makes the training look as if it is 56 hours long and involves overnight stay.

  o Maintain prior, completed events in the calendar view while removing them from the search view.

- Ability to set up automated email responses to new member applicants, approved member applicants, members requiring continued education credits, and event registration confirmation.

- Learn how to fully utilize IQAs (queries) to build reports.

- Learn how to successfully edit Business Objects to include new data without compromising existing fields and website functionality. This is related to 3A and 3B in Consultant Support above. We seek a consultant who can both make the changes outlined above, and train our site administrative staff how to add categories/data in the future.

3. A Pre-Proposal Conference will be held on **January 3, 2018 beginning at 10:00am, at** Judicial College's Department of Professional Development, 2011 D Commence Park Drive, Annapolis, MD 21401 / Conference Room: UL1.

   Attendance at the Conference is not mandatory in order to facilitate better preparation of proposals.

4. **Contract Type**
   The resulting contract shall be for Fixed Price.

5. **Contract Term**

   The Contract resulting from this RFP shall begin **upon execution** and extend for a base period of **one year**. The Judiciary shall have the sole right to exercise up to **one one-year** renewal options at its discretion.

6. **Procurement Officer**

   The sole point-of-contact for purposes of this RFP prior to the award of any Contract shall be the Procurement Officer at the address listed below:

   > **Lisa Lee** Procurement Officer
   > Maryland Judiciary
   > Procurement and Contract Management
   > Telephone: 410-260-1263
   > Email: Lisa.Lee@mdcourts.gov

7. **Form of Response**

   Proposals must be in writing.

   a. **Part I** – Technical proposal must include a written response to the Scope of Work that demonstrates the Offeror's work plan, capabilities and experience in providing the required services, and

   b. **Part II** – Price proposals must include the fully loaded fixed price for the services proposed using Attachment A (Price Proposal Form).

8. **Proposal Closing Date**

   All proposal must be received via email to the Procurement Office at the email address listed in Section Number 5, no later than **no later than 2:00pm (local time) on January 19, 2017** in order to be considered.

9. **Award Determination**

   The Contract resulting from this RFP will be awarded to the Offeror whose proposal is determined to be the most advantageous to the State, based on the evaluated spectrum of services proposed and price.

   - Experience
   - Availability
   - Work Plan for this engagement
   - Price

Attachment A - Price Proposal Form

Contractor's price proposal must be complete and include all charges. AOC will not pay for any charges not listed in their quote.

FOR SERVICES AS REQUIRED AND PROPOSED:

Consultant/Management Support Services: Base 1 year $_____

Training: **Base 1 year** $_____

                                                           Total 1 year $_____

Consultant/Management Support Services: Option 1 year $_____

Training: **Option 1 year** $_____

                                                           Total Option 1 year $_____

                                                           Grand Total $_____

*Fully loaded fixed price that includes all direct and indirect costs and profit for the Contractor to perform. Indirect costs shall include all costs that would normally be considered general and administrative costs and/or travel costs, or which in any way are allocated by the Contractor against direct labor hours as a means of calculating profit or recouping costs which cannot be directly attributable to the Contract.

Submitted by Authorized Signature	
Date	
Print Name and Title	
Company Name	
Company Address	
Telephone	Email address
Federal Tax Identification #	