LEWIS AND CLARK COUNTY, MONTANA
REQUEST FOR PROPOSALS
DEPARTMENT OF CRIMINAL JUSTICE SERVICES
CASE MANAGEMENT & DATA MANAGEMENT SYSTEM

Introduction

Lewis and Clark County (hereafter, the "County") is soliciting proposals from qualified offerors for a Criminal Justice Services (CJS) case management and data management system (hereafter, the "System").

The System must be a seamless solution beginning with Detention Center booking and following each incarcerated individual through Detention Center-based programs and services, pretrial services, community-based programs, and specialty courts.

The System must generate accurate data that can be analyzed to allow policy makers and criminal justice system leaders to focus policy on the true factors driving peoples' involvement in the criminal justice system, inequities in the system, population trends, and operational costs.

Background

Established in December 2017 through a Public Safety mill levy, CJS exists to improve the safety of the citizens of Lewis and Clark County and ensure the equitable and efficient treatment of defendants, offenders, and victims. Over the past five years, CJS has endeavored to establish and implement voter mandated programs, forge relationships across the criminal justice spectrum, actualize a robust strategic planning initiative, and assist in implementing research-based criminal justice reform practices. CJS is responsible for six programs and two specialty courts, with a third specialty court and a law-enforcement led diversion program planned, pending funding.

Court Services:

Personnel	▪ FTE Court Services Assistant ▪ 4.0 FTE Pretrial & Misdemeanor Probation Officers
Pretrial Services Program	▪ Launched May 2018 ▪ Average caseload of 400 clients ▪ 78% overall success rate ▪ Currently using AutoMon AIMS case management software
Post-Adjudication Supervision Services (PASS)	▪ Started in 2019 ▪ Misdemeanor mental health court ▪ Average caseload of 20 clients ▪ Currently using Excel spreadsheets for data tracking

Behavioral Health Services:

Personnel	▪ 1.0 FTE Behavioral Health Coordinator ▪ 2.0 FTE Therapists ▪ 1.0 FTE Case Manager ▪ 1.0 FTE Education and Transition Coordinator
Detention Center Behavioral Health Team	▪ Detention Center based ▪ In 2022, therapists conducted 121 suicide intervention sessions and 712 therapeutic interventions ▪ Case manager provided 348 case management sessions ▪ Currently using Excel spreadsheets for data tracking
MAT Bridges Program	▪ Detention Center based ▪ Research based; proven effective ▪ Collaborative program between Sheriff's Office, CJS, PureView Health Center, and Helena Indian Alliance ▪ Currently using Excel spreadsheets for data tracking
7 Generations Program	▪ Detention Center based ▪ Public Health program ensuring a research-based approach to early childhood intervention ▪ Currently using Excel spreadsheets for data tracking
Education & Transition Program	▪ Detention Center based ▪ Education and Transition Coordinator facilitates ▪ Life skills classes, self-help groups, and other volunteer-led learning ▪ Ensures incarcerated individuals leave the Detention Center with a plan ▪ Currently using Excel spreadsheets for data tracking
Our Place Drop-In Center	▪ Good Samaritan Ministries operated ▪ Peer-run support program specializing in behavioral health challenges ▪ Currently using Excel spreadsheets for data tracking

Project Schedule

Publication of Notices	August 19 & August 26, 2023
Questions Due	September 1, 2023
Responses to Questions Returned	No later than September 8, 2023
Proposal Due	September 18, 2023
Proposals Opened	September 19, 2023
Product Demonstrations	No later than September 29, 2023
Proposal Evaluations	No later than October 6, 2023
Scoring Committee Review Meeting	No later than October 13, 2023
Offeror Selection/Contract Negotiation	No later than October 20, 2023

Proposal Submission Requirements

- Offerors must submit six (6) copies of the proposal and one (1) digital copy in PDF format contained on a flash drive.
- Proposals must be received no later than 4:00 PM MDT on September 18, 2023. Proposals received after the deadline will not be considered.
- Proposals must be sealed and prominently marked "Criminal Justice Services Case Management and Data System RFP", and submitted to:

  Office of the Board of County Commissioners
  Attention: CJS Case Management & Data System RFP
  316 North Park Avenue, Room 345
  Helena, MT 59623

- Proposals will be unsealed on September 19, 2023, at 9:00 AM in Room 309 of the City-County Building, 316 N. Park Avenue, Helena, MT.
- Offerors with questions related to this solicitation must contact Casey Hayes, Lewis and Clark County Purchasing Officer, at chayes@lccountymt.gov. Questions may be submitted until 4:00 PM MDT on September 1, 2023. Responses to questions will be posted to the County's website no later than September 8, 2023.
- The County has allocated up to $300,000 for the purchase of the products and services necessary to fully implement the System.
- A determination must be made of the awarded offeror's financial and operational stability to serve the County. Only proposals from financially responsible organizations, as determined by the County, that are presently engaged in the business of providing case management systems must be considered.
- The County reserves the right to contact offerors' current and prior clients prior to award of a contract.
- Any costs associated with the preparation of proposals, product demonstrations, or any expenses related to responding to this solicitation are the sole responsibility of the offeror.
- All proposals should address, in writing, all of the outlined system requirements listed in this solicitation. Offerors are responsible for providing as much detail as possible for each of the system requirements in order to portray their product as accurately as possible.

Proposal Content Requirements

Proposals that do not meet the minimum requirements may be considered non-responsive. The County reserves the right to waive irregularities. Offerors must submit a proposal that includes the following contents:

- A letter addressed to the Lewis and Clark County Commissioners that includes:
  - Name and address of the offeror
  - A statement that the proposal is in response to this solicitation
  - Signature, typed name, and title of the individual who is authorized to commit the offeror to the proposal
- Offeror information:
  - Number of years the company has been providing criminal justice program case

management and data systems
    - Company achievements
    - Organizational structure
    - Number of employees
    - Resume of District Manager/Account Manager to be assigned to the County
    - Name, title, and telephone number of the point of contact for this solicitation
    - References containing email addresses and telephone numbers
    - Federal Fax Identification Number
- Technical proposal:
    - All details of the system being offered as it relates to the requirements outlined in this solicitation
    - Details of any additional system functionality that does not relate to the requirements outlined in this solicitation
    - Initial and annual costs for the System, including any cloud storage fees
    - Service maintenance agreements and levels of coverage, as applicable
    - Warranties

Selection Criteria

Proposals will be reviewed and scored by a committee to determine completeness and quality of content. The criteria for evaluating proposals, and the respective points for each, are as follows:

Criteria	Description	Points Possible
Ease of Use	County's assessment of ease of use of the System. This includes the County's analysis of the ease of data entry, access to information, and overall use of the System's features.	25 points
Overall Cost	The initial and annual costs of the System including cloud storage fees and maintenance.	30 points
Reputation & References	Past history and references. Offerors must include a listing of references with their proposal, including facility locations, names and telephone numbers of a point of contact. This list should contain at least five (5) current references.	15 points
Data Collection & Reporting Capabilities	Ability to conduct data collection and reporting within the System, including the ability to self-query data and defined data fields with minimal open-text fields (excluding text boxes for case notes, comments, etcetera).	30 points
Total		**100 points**

- The evaluation committee will review proposals to determine that they meet the minimum requirements. Offerors whose proposals meet the minimum requirements may be allowed to demonstrate their product for the committee. The committee will not make a decision about the award before the timeframe for completing demonstrations has expired.

- The successful offeror will be chosen based on their qualifications and selection criteria score.

Method of Award

- After scoring each proposal based upon the established criteria, the evaluation committee will rank each proposal against the others. The County will attempt to negotiate a contract with the offeror ranked first by the committee.
- If a satisfactory agreement can be reached, the contract will be awarded to the offeror. If not, negotiations will be conducted with each subsequent offeror in rank order until a satisfactory agreement can be reached or unless the committee determines the rejection of all proposals is in the best interest of the County.
- The overall cost offered in the proposal will be considered firm and cannot be altered after submission.
- The successful offeror must commence work only after the transmittal of a fully executed contract to the Lewis and Clark County Board of County Commissioners and will perform all services indicated in the proposal in order to satisfy the scope of services of the contract.
- All offerors will be notified in writing of the County's selection after contract negotiations are completed.

CRIMINAL JUSTICE SERVICES
CASE MANAGEMENT & DATA SYSTEM REQUIREMENTS

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System Overview

- The system should allow authorized users to change commonly altered variables without intervention from the vendor or IT.
- The system should allow multiple (unlimited) users to be logged into the system and using the same applications simultaneously.
- The system should allow multiple (unlimited) users to view, add, and edit information in the same records simultaneously.
- The system should provide global search functions for any field stored in the system.
- The system should ensure that these search functions include SOUNDEX and partial searches.
- The system should be able to generate a summary of each record displayed within these search results, including digital images.
- The system should be able to print, save or email a list directly from the list view window.
- The system should be able to print, save or email a record directly from the record detail window.
- The system should allow the creation of an agency-specified header for use within printouts from the system. This header should include both an image and text.
- The system should allow authorized users to maintain a list of agencies.
- The system should include a list of active program participants with key identifying data such as which program they're in and the number of active cases.
- The system should provide a main case management window that displays information such as clients with upcoming tasks, clients currently detained, clients in treatment, and clients with active warrants. This window should be configurable.
- The system should be capable of creating a clear history for every client's program participation history and cases.
- The system should ensure that forms capture, store, and print with electronic signatures.
- The system must support a built-in visual query builder as the preferred method of data extraction.
- The system should retain an audit trail of all system changes made by authorized users including any changes made to a record after initial entry.

Security

- The preferred solution should use Single Sign On (SSO) technology for access control and authentication with integration to Azure AD.
- The system should provide multiple levels of data security control, including access by user and user group.
- The system should provide access levels, including view, edit, delete, and admin for each component of the system for users and user groups.
- The system should track the user who last entered or updated any record as well as the date and time of the modification.
- The system should be able to create an audit record each time a record is created, edited, or viewed.

Architecture

- The preferred solution should be Software as a Service (SaaS).
- All servers and data associated with the system must reside within the continental United

States.

- The preferred solution should be hosted on a private cloud or virtual private cloud. For the purpose of this RFP, a private cloud is either a single-tenant environment where the hardware, storage and network are dedicated to this solution; or a virtual private cloud, a multi-tenant environment with network isolation and private subnets.
- The vendor must perform all work on the proposed solution from within the continental United States of America. The solution must not be accessible from outside the United States.
- The vendor must be responsible for acquisition and operation of all hardware, software and network support related to the hosting services being provided.
- Local network equipment and workstations will be furnished by the agency.
- The vendor must develop and implement the system and all dependent hosted hardware in such a manner that allows for direct network communications with the vendors system and the exchange of data via approved industry standard protocols for interfacing with other systems as deemed necessary.
- The vendor should describe their backup and retention policy.
- The vendor should describe their Recovery Time Objective (RTO) and Recovery Point Objective (RPO) policies in the event of a disaster.
- The vendor must provision all environments including, at minimum, the following:
    - Training
    - Testing
    - Production
- The vendor must ensure that the testing/training environments allow the users to work with a copy of the production data without influencing the production environment.
- The vendor must keep the hosting environment current and up to date.

User Interface

- The system should be able to perform data validation/error checking for fields in the system.
- The system should allow specific fields to be designated as required to force users to enter essential information before saving a record.
- The system should visibly identify required fields (for example, by color-coding them). If a user attempts to save a record without completing all required fields, the system should visibly notify the user of the remaining required.
- The system should provide auto-completion for frequently entered information. Once the user begins typing, the appropriate data should automatically populate into the record.
- The system should use the tab key to move between fields.
- The system should include a spellchecker for narrative fields throughout the system. Users should be able to add words such as local place names to the spellchecker's dictionary.

Integration

- The system should provide a one-time, single point of data entry to allow information to be accessible from other modules in the system once it has been entered.
- The system should have consistent user interface design throughout.
- The system should integrate alerts between all modules so that alerts entered in one area are available in all others.

- The system should provide an agency and user-customizable dashboard that displays summary information from any modules which the user has permission to access (for example, current list of individuals on the pretrial services program, or current list of individuals on the pretrial services program detained, etc.).
- The system should be able to display dashboard reminders of overdue and soon-to-be-due tasks for users or user groups.

Master Name Index

- The system must link all activity of a person to a single master name record. Please explain in detail the master name index architecture and functionality.
- The system should link the master name record to and provide a list of all activity with which the person was involved, including cases, jail bookings, activities, and anything built with custom modules.
- The system should include links from the activity list on the master name record to any other record in which the person was involved, in the module the activity originated. Access to these records should be controlled by user permissions.
- The system should include links to the master name index from name fields found throughout the system.
- The system should support advanced name searching based on any combination data elements in a master name record.
- The system should allow searching for persons and by full or partial names.
- The system should permit the use of cases on master name records.
- The system should eliminate the need to duplicate any name information after it has been entered into the system.
- The system should allow users to update any basic data fields and add or modify other information on the master name record once it has been created.
- The system should display the last modified date on each master name record.
- The system should cross-reference each master name record to all other records associated with a person.
- The system should automatically add names to the master name index when entered elsewhere in the system.
- The system should allow users to manually enter names directly into the master name index.
- The system should have built-in checking to reduce the possibility of creating duplicate master name records for the same person or business.
- The system should have the ability to merge duplicate name entries, giving the user the choice of which name data elements to keep for the merged record.
- The system should allow users to select, view and merge multiple names at once to a single master name record rather than having to merge them one name at a time.
- The system should store narrative comments linked to a name and display it upon inquiry for its master name record.
- The system should display an address history for persons including dates of address changes.
- The system should check all coded entries in the master name index for validity at the time of data entry.
- The system should automatically display any user-entered name alerts (medical alerts,

officer safety threats, and other agency-defined alert types).
- The system should allow users to create new name alerts from or for a master name record.

User Notifications/Messages
- The system should include an internal e-mail-style messaging system that supports the secure transmission of messages with attachments within the agency's network.
- The system should support "if", "then", and "when" business rules for notifications throughout the system.
- The system should include system-wide business rules that allow authorized users to configure unlimited notification scenarios for users and workgroups.
- The system should provide business logic which, from information entered into certain required fields, will automatically display other required and/or corresponding fields which pertain to the data already entered.
- The system should include business rules that notify users and/or open up the next sequential required field(s) and/or window(s) based on the information added to the record.

Client Notifications/Messages
- The system should automatically notify a client based on information stored in the client profile.
- The system must support both unscheduled, manual text message reminders sent by users and scheduling of SMS text messages to be sent automatically based on date/times.
- The system should support "if", "then", and "when" business rules for notifications throughout the system.
- The system should include system-wide business rules that allow authorized users to configure unlimited notification scenarios for individual clients and/or program participant groups.
- The system should provide business logic which, from information entered into certain required fields, will automatically display other required and/or corresponding fields which pertain to the data already entered.
- The system should include business rules that notify users and/or open up the next sequential required field(s) and/or window(s) based on the information added to the record.

Attachments
- The system should allow the attachment of files (for example, .DOC, .XLS, .JPG, .WAV, .PDF) to specified record types. Attached files should be able to be opened or viewed on any workstation by authorized users who have the necessary third-party applications (such as MS Word or MS Excel).
- The system should support scanning and attaching documents directly to records in the system without the need to first save them elsewhere.
- The system should store attached files on the vendor’s environment within the software (not on an open network folder) for security and ease of access.

Custom Forms

- The system should allow authorized users to create custom data collection forms to support agency-specified functionality, without any intervention from the vendor or IT.
- The system should allow authorized users to create an unlimited number of custom forms.
- The system may allow each custom form to be associated with, and subordinate to, a non-custom form (the parent form).
- The system should ensure that the custom forms are integral with the rest of the system and not provided via a third-party application.
- The system should support printing the data from custom forms via an agency-defined output template.
- The system should allow authorized users to add unlimited data items from the parent form when creating a custom form.
- The system should allow authorized users to include as many fields for data collection as are necessary on custom forms, including the ability to update fields with additional options as well as names from the Master Name Index, personnel, other users, and other agency-defined lists.
- The system should support the following types of agency-defined fields for custom forms, including but not limited to:
    - Address
    - Automatic record sequence numbers
    - Multiple item select boxes
    - Dates/Times
    - Dollar value
    - Names
    - Numbers
    - Signatures (for electronic signatures)
    - Checkboxes
    - Yes/No drop-downs
    - Drop-downs from agency-defined lists
    - Free form text
- The system should allow a custom form to create a relationship on master name records when those fields are specified within the custom form.
- The system should allow authorized users to specify the label for each field and data item on a custom form.
- The system should allow authorized users to specify if each field on a custom form is required or not required.
- The system should allow for setting the default value for each field.
- The system should allow the authorized users to arrange the data items and fields in any order on the form.
- The system should make the data items and fields on custom forms available to the built-in report generator.
- The system should allow records captured via custom forms to be saved to an external file, emailed and/or printed.

Custom Queries and Reports

- The system should provide a report generator for building custom statistical and analytical reports from data. The report generator should be provided by the same vendor and should be integrated within the application and fully supported by the vendor.

- The system must support a built-in visual query builder as the preferred method of data extraction.
- The system must allow data to be easily accessible and extractable at multiple levels with unique information by row and easily identifiable columns. The system must be able to extract data at a variety of different levels with unique identifiers such as:
    - At the Client-level
    - At the Case-level
    - At the Arrest-level
    - At the User-level
- The system must include the ability to build, run and export into common formats such as XLS and CSV custom queries based on logical, conditional statements *without* submitting a ticket or request to the vendor. Authorized employees must be able to extract and export data on-demand.
- The system must be able to export any data query results in .XLS and/or .CSV format.
- The report generator should allow reports to be saved (as PDF, .XLS, or .CSV), printed, or emailed directly from the report.
- The system should restrict access to the report generator and individual report templates by user or user group.
- The system must not allow a user who does not have access to particular data via the application user interface to gain access to that data via the report generator.
- The report generator should allow the creator of each report template to choose which users can access and/or run the report and/or modify the report template.
- The report generator should support the use of aggregate (math) functions including Sum, Average, Count, Count Blank, Minimum, and Maximum.
- The report generator should allow data to be grouped or sorted by any data element.
- The report generator should allow multiple data filters to be applied using "and/or" logic.
- The report generator should allow report templates to be saved and modified at a later time.
- The report generator should support adding user-specific reports to the user's dashboards.
- The report generator should support ad-hoc queries.

Support and Maintenance

- The vendor must provide software updates as necessary.
- The vendor should schedule and perform software updates at no additional cost to the agency as part of the standard maintenance agreement.
- The vendor must load all software updates on the testing environment before loading them on training and production environments.
- The vendor should include all updates, enhancements, new versions, including maintenance of the hosting platform as part of its standard software maintenance agreement.
- The vendor should ensure that the agency will not have to purchase any third-party software of any kind as long as its software maintenance agreement is maintained.
- The vendor must be responsible for the hosted platform. This includes ensuring that system performance criteria are met, and that the hosting platform continue to meet the server operating system and database software requirements.

- The vendor should provide, as part of the standard maintenance agreement, real-time 24x7x365 monitoring of the hosted platform to detect and manage any potential issues with the system.
- The vendor must ensure that any updates required at the client machine are automated without any intervention from the vendor or IT.
- The vendor must provide a responsive customer service process, to include electronic and telephonic ways to contact customer support.
- The vendor must provide an escalation channel for any issues that are not resolved within a reasonable time.
- Vendor must provide service level agreement that describes, in detail, the ability to capture and report on new data elements.

Client Contacts

- The system must have the ability to document all client contacts with users.
- The system should include the ability to quickly view the Client's contact requirements, including frequency, type (office, phone, jail, etc.), and for which program/service.
- The system should be able to quickly view all of a client's previous contacts, with the ability to filter by date range.
- The system should include a way to quickly view all of a client's scheduled, future contacts, with the ability to filter by date range.
- The system should include the ability to retroactively add a contact that has already occurred.
- The system must include an open-text narrative section at each contact for users.

Client Tasks & Activities

- The system must allow authorized users to document, schedule, and track common tasks and activity types, locations, dates, and outcomes for each activity type. Examples include hearings, appointments, classes, etc.
- The system must have the ability to add and track tasks and activities across multiple programs for a single individual.
- The system must have the ability to add and track multiple cases for a single individual and must have the ability to add and track multiple hearings for each case.
- The system should flag when a user tries to schedule conflicting tasks.
- The system should provide log of client activities, both for all clients and for an individual client.
- The system should allow activities to be recorded as they occur or scheduled in advance.
- The system must support SMS text messages to clients for task reminders.
- The system must support both unscheduled, manual text message reminders sent by users and scheduling of SMS text messages to be sent automatically based on date/times.
- The system should allow for new to create custom forms to enter associated data.

External Interface Requirements

Describe the systems interface capabilities with other systems such as:

- The Detention Center's Jail Management System (Central Square)
  - The system should allow one-way electronic data transfer of booking and release details

from the Detention Center to the Criminal Justice Services system.
    - This interface would not be required at the time of software implementation. The estimated time period to have this interface would be 2025.
- Automon/AIMs
    - The system should allow one-way electronic data transfer of booking, release, and case disposition details from the Criminal Justice Services system to the State Office of Court Administrator's system—Automon/AIMs.
    - This interface would be required at or near the time of software implementation.
- Tableau or Power BI
    - The system should allow for interfacing with Tableau or Power BI visualization/analysis.
- Karpel
    - The system should allow two-way electronic data transfer of case details for user-specific clients.

Data Migration

- The vendor must be responsible for the conversion and migration of data for CJS's Pretrial Services program only. All current Data migration will be needed from Automon/AIMs only.
- Converted data must be available in the system at Go Live such that the information appears as if to be captured by the system.

Data Elements

The system must collect the following data elements at a minimum:

Minimum Data Elements Across All Programs and Services:

Client Details (Details required for each person)	• Name and Aliases • Client Addresses (up to 10) • Client Phone Numbers (up to 10) • Client E-mails (up to 10) • Social Security Number • Date of Birth • Race/Ethnicity • Sex/Gender • Marital status • Military History • Employment Status/History • Education Status/History • Housing Status/History	• Insurance Status • Primary Healthcare Provider Employment details, including contact information and dates of employment (up to 10) • Associates details including relationship (attorney, spouse, case worker, etc.) and contact information. (up to 10) • Flags/Alerts (Violent, Active Warrant, Detained, In Treatment, DOC, Other) • Programs enrolled in with dates and activity status • Substance Use Status/History

Case-Specific History (Collected per case)	Basic	• Case Number • Case Type (based on programs case is assigned to) • Court Location (Municipal, District, Justice, Other) • Status (Open, Closed, Pending Closure)	• Judge Name • Reason if Status=Inactive: New Supervision (DOC/Treatment Court, Never Checked-In to Program, Absconded, etc.) • PSA Completed (Yes/No) • Case Has Active Warrant (Yes/No)
	Arrest-Specific History	• Date of Arrest • Permanent Booking ID • Counts per Charge • Classification (Felony/Misdemeanor) • Arresting Agency	• Charges • Booking Number ID for Arrest • Violent Offense (Yes/No) • Domestic Violence Offense (Yes/No) • Sexual Offense (Yes/No) • Weapons-Related Offense (Yes/No)
	Release-Specific History	• Release Date • Location/GPS Monitoring (Yes/No) • Substance Use Testing (SUT) (Yes/No)	• Bond Type (Personal Recognizance, Personal Co-Signed, Cash, Surety) • Cash Bond Amount ($) • If SUT, type and frequency of testing • All Other Conditions
	Case Disposition History	• Closed Date	• Case Disposition: Acquittal, Dismissed, Diversion, Guilty plea, Sentenced, etc.
	Warrants	• Date Issued • Date Resolved • Reason for Warrant	• Amount • Outcome: HPD Called, Open Court, etc.
Case Management - Contact History	Contact History (Collected per contact)	• Program Contact Type (Pretrial, PASS, BH Therapy, MAT etc.) • Contact Location (Office, Phone, Home, Jail, Other) • Status (Scheduled, Completed, Failed to Report, Declined, Excused) • User Name who made contact	• Contact duration in minutes • Date and time of contact • Reason if Status = Excused (Contact with Office, Incarceration, Hospitalization, Treatment, Office Closed, or Other) • Ancillary services provided • Care Coordination services provided

Minimum Program-Specific Data Elements the System Should Collect (not exhaustive)**:**

Pretrial Services Program	Basic	• Primary Pretrial Officer • Date Assigned (per case) • Assigned Level (per case) • Date of 1st Check-In (per case)	• Supervision level based on highest level assigned across all assigned cases
	Public-Safety Assessment (Details per Case)	• Associated Case Number • Failure to Appear Score (1-6) • Flagged for New Violent Criminal Activity (Yes/No)	• Assessment Date • New Criminal Activity Score (1-6) • Recommended Pretrial Monitoring Level (1-3)
	Substance Use Testing	• Test Date • Type (Drug, Alcohol, Both) • Drug Result: Positive/Negative • Alcohol Result: Positive/Negative • Subsidized Testing (Yes/No) • Subsidized Testing – Dates Paid	• Testing Location • Overall Outcome (Positive, Negative, Failure to Appear, Excused • Drugs Detected (if positive) • BAC% (if positive) • Subsidized Testing – Amount Paid
	Violations	• Date of Violation • Type of Violation I (Technical Violation, Court Violation, etc.) • Type of Violation II (Substance Use, Alcohol, Failure to Appear in Court, Failure to Report to Pretrial, Other)	• Date Violation was Filed • If Failure to Appear in Court = Yes: Hearing Rescheduled? (Yes/No), Warrant Issued? (Yes/No)
	Program Metrics	• Successful/Unsuccessful while on Pretrial (Case - Specific)	• Reason if Unsuccessful: Failure to Appear, Misdemeanor Arrest, Felony Arrest
Detention Center Services	BH Services	• Diagnosis Category • Type of Service • Disposition	• ICD-10 Diagnosis • Assessments Completed
	Education/ Transition	• Classes/Programs Attended • Completed (Yes/No)	• Dates of Attendance

Standard Terms and Conditions

By submitting a response to this Request for Proposal, the offeror agrees to acceptance of the following Standard Terms and Conditions and any other provisions that are specific to this solicitation.

1. **Authority**
   This Request for Proposals (RFP) is issued under the authority of the Lewis and Clark County Purchasing Policy. The RFP process is a procurement option which allows the award to be based on evaluation criteria in addition to cost. The relative importance of all evaluation criteria is found herein and only the evaluation criteria outlined in the RFP will be used. Lewis and Clark County (herein, the "County") reserves the right to accept or reject any or all proposals, wholly or in part, and to make awards in any manner deemed in the best interest of the County.

2. **Competition**
   Lewis and Clark County encourages free and open competition among offerors to obtain quality, cost-effective services and products. Whenever possible, specifications, invitations, and conditions are designed to accomplish this objective, consistent with the necessity to satisfy the County's needs and accomplishment of a sound economical operation.

   The offeror's submission of a proposal guarantees that the prices quoted have been established without collusion with other eligible offerors and without effort to preclude Lewis and Clark County from obtaining the lowest possible competitive price.

   Prior to the award of the contract, proposals may be held by Lewis and Clark County for a period not to exceed 90 days from the date of the opening of proposals for the purpose of reviewing proposals and investigating the qualifications of the offerors.

3. **Public Inspection of Proposals**
   All information received in response to this RFP, including copyrighted material, is deemed public information and with one exception will be available for public viewing and copying after the proposal deadline.

   The public will not be able to view bona fide trade secrets meeting the requirements of the Uniform Trade Secrets Act, Title 30, Chapter 14, Part 4, MCA. The purchasing officer will remove any such trade secrets from the RFP prior to public viewing.

4. **Bona Fide Trade Secrets**
   Confidential information meeting the requirements of Title 30, Chapter 14, Part 4, MCA will be available for review only by the purchasing officer, the evaluation committee

members, and limited other designees. Before the RFP is made available to the public, the purchasing officer will remove the confidential information if the following conditions are met:

- Confidential information is clearly marked and separated from the rest of the proposal;
- No confidential material is contained in the cost section; and
- An affidavit from the offeror's legal counsel attesting to and explaining the validity of the trade secret claim is attached to the proposal.

The offeror shall pay all legal costs and fees associated with defending a claim for confidentiality if a “right to know” request is received from another party.

In order for an offeror to request that material be kept confidential, a notarized Affidavit for Trade Secret Confidentiality shall be provided by the offeror’s attorney acknowledging that material included in a proposal is open to public inspection except for information that meets the provisions of Montana’s Uniform Trade Secrets Act.

5. Classification of Proposals as Responsive or Non-responsive

All proposals will be classified as either “responsive” or “non-responsive.” A proposal is considered “responsive” if it conforms in all material respects to the requirements of the RFP. A proposal may be found non-responsive if:

- Required information is not provided;
- The cost proposal is excessive or inadequate as measured by criteria stated in the RFP;
- The proposal does not conform to the specifications described and required in the RFP.

If a proposal is found to be non-responsive, it will receive no further consideration.

6. Determination of Offeror Responsibility

The purchasing officer and/or the selection committee will decide whether an offeror has met the standards of responsibility based on the requirements of the RFP. Factors used to determine the responsibility may include whether the offeror has:

- The appropriate financial, material, equipment, or human resources to meet all contractual requirements;
- A satisfactory record of integrity;
- The legal ability to contract with the County;
- Provided all information requested for use in the determination of responsibility; and
- A satisfactory record of past performance.

An offeror may be deemed “non-responsible” at any time during the procurement process if information surfaces to support such a determination.

7. Evaluation of Proposals and Offeror Interviews/Product Demonstration

The remaining proposals will be scored according to the evaluation criteria stated herein. The selection committee may ask finalists to appear for interviews or product demonstrations or to provide written responses to items requiring clarification. Any costs associated with interviews or product demonstrations are the sole responsibility of the offeror.

8. County’s Right to Investigate and Reject

Lewis and Clark County may make such investigations as are deemed necessary to determine the ability of the offeror to provide the product or services specified. The County reserves the right to reject any proposal if the evidence obtained fails to satisfy the County that the offeror is properly qualified to perform the obligations of the contract. This includes the County's ability to reject a proposal based on negative references.

9. Offeror Selection and Contract Execution

After an evaluation of the offeror, interviews, and/or product demonstrations, the selection committee will recommend a contract award, which the purchasing officer will communicate to the offeror selected. If the offeror and the County cannot agree on the contract terms, the County may move to the next ranked offeror or cancel the RFP. The work described in the RFP may begin only after the contract is signed by all parties.

10. County’s Rights Reserved

Submission of a proposal confers no rights upon any offeror and shall not obligate the County in any manner whatsoever. Lewis and Clark County reserves the right to make no award and to solicit additional proposals at a later date.

The RFP in no way constitutes a commitment by the County to award and execute a contract. If such actions are deemed in its best interests, the County, in its sole discretion, reserves the right to:

- Cancel or terminate this RFP;
- Reject any or all proposals received in response to this RFP;
- Waive any undesirable, inconsequential, or inconsistent provisions of this RFP; and/or
- If awarded, suspend contract execution or terminate the resulting contract if the County determines adequate funds are not available.

11. Nondiscrimination

In accordance with federal and state laws, the offeror agrees not to discriminate against any client, employee, or applicant for employment or for services because of race, creed, color, national origin, sex, or age with regard to, but not limited to, the following:

- Employment upgrading;
- Demotion or transfer;
- Recruitment or recruitment advertising;
- Lay-offs or terminations;
- Rates of pay or other forms of compensation;
- Selection for training; or
- Rendition of services.

Offerors and the awardee shall comply with all federal, state, and local laws, rules and regulations. Offerors and the awardee and any of the offerors' and the awardee's sub-grantees, contractors, subcontractors, successors, transferees, and assignees shall comply with Title VI of the Civil Rights Act of 1964, which prohibits recipients of federal financial assistance from excluding from a program or activity, denying benefits of, or otherwise discriminating against a person on the basis of race, color, or national origin (42 U.S.C. § 2000d et seq.), as implemented by the Department of the Treasury's Title VI regulations, 31 CFR Part 22, which are herein incorporated by reference and made a part of this contract (or agreement). Title VI also includes protection to persons with "Limited English Proficiency" in any program or activity receiving federal financial assistance, 42 U.S.C. § 2000d et seq., as implemented by the Department of the Treasury's Title VI regulations, 31 CFR Part 22, which are herein incorporated by reference and made a part of this contract or agreement.

It is further understood that any offeror who is in violation of this clause shall be barred forthwith from receiving awards of any purchase from Lewis and Clark County unless a satisfactory showing is made that discriminatory practices have ceased, and the recurrence of such acts is unlikely.

12. Insurance

The awarded offeror shall maintain general liability insurance in the amount of one million dollars ($1,000,000.00) per occurrence (minimum) and two million dollars ($2,000,000.00) aggregate. The awarded offeror also shall maintain workers compensation insurance. Both general liability and workers compensation insurance must be from an insurance carrier licensed to do business in the State of Montana. The awarded offeror agrees to furnish proof of insurance to the County prior to commencing work under the agreement brought about by this solicitation. The County must be listed as an additional insured on the general liability insurance certificate for this agreement.

13. Cone of Silence

A cone of silence shall be established on all Lewis and Clark County competitive selection processes. The cone of silence prohibits any communication regarding a competitive solicitation between any offeror (or its agents or representatives) or other entity with the potential for a financial interest in the award (or their respective agents or representatives) regarding such competitive solicitation, and any County official (elected or appointed), employee, selection committee member, or other persons authorized to act on behalf of the County other than the individual outlined as the point of contact in this solicitation.

The cone of silence shall be in effect from the time of advertisement until contract award. Violations of the cone of silence may be grounds for disqualification from the selection process. The cone of silence shall not apply to communications with the established point of contact in this solicitation or at any public proceeding or meeting.

The cone of silence shall terminate when the Board or a County employee authorized to act on behalf of the Board awards or approves the Contract, rejects all offers or responses, or otherwise takes action to end the selection process.

14. Protest Procedure

An offeror aggrieved in connection with the solicitation or award may protest in accordance with the procedure outlined in the Lewis and Clark County purchasing policy.

End of Request for Proposals