SANTA FE COUNTY

REQUEST FOR PROPOSALS (RFP)

RFP for the Acquisition and Implementation of a Jail Management System (JMS)

NM Commodity Code: 20810, 20851, 20857, 20868, 20871

RFP NO. 2026-0023-PSD

July 2025

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I. ADVERTISEMENT
SANTA FE COUNTY
Acquisition and Implementation of a Jail Management System
RFP NO. 2026-0023-PSD

The County requests proposals from qualified Offerors to provide **a Jail Management System (JMS).** All proposals submitted shall be valid for ninety (90) days, subject to action by the County. The County reserves the right to reject any and all proposals in part or in whole. A completed proposal shall be submitted in a sealed container indicating the proposal title and number, along with the Offeror's name and address clearly marked on the outside of the container. All proposals must be received by **2:00 PM MST on Monday, September 1st, 2025, at the Santa Fe County Purchasing Division, 102 Grant Avenue, (First Floor), Santa Fe, NM 87501.** The submission of Proposals **will also be accepted electronically** utilizing a Dropbox**.** Please utilize this link to upload your proposal submission.
https://www.dropbox.com/request/tHdKINLxTXPnmfREGpKB

By submitting a proposal regarding the requested services, each Offeror certifies that it is a qualified firm and its proposal complies with the requirements stated within the Request for Proposals.

A **Pre-Proposal Conference** will be held at **10:00AM (MDT)** on **Tuesday, August 5, 2025 online via Microsoft Teams using link** https://teams.microsoft.com/l/meetup-join**. Meeting number ID: 245 867 8111 774 8, Passcode: 39yt3oN9 or by calling (773) 352-2011, Phone conference ID: 649 649 889#. This pre-proposal conference is a non-mandatory but attendance is strongly recommended.**

EQUAL EMPLOYMENT OPPORTUNITY: All qualified Offerors will receive consideration of contract(s) without regard to race, color, religion, sex or national origin, ancestry, age, physical and mental handicap, serious medical condition, disability, spousal affiliation, sexual orientation or gender identity.

Request for Proposals will be available by contacting Bill Taylor, Procurement Manager, 102 Grant Avenue, (First Floor) Santa Fe, New Mexico 87501, or by telephone at (505) 986-6373, or by email at wtaylor@santafecountynm.gov or on our website at http://www.santafecountynm.gov/finance/purchasing-division/current-bid-solicitations.

Proposals received after the date and time specified above will not be considered and will be rejected by Santa Fe County.

Santa Fe County

II. INTRODUCTION

A) PURPOSE OF THIS REQUEST FOR PROPOSAL

Santa Fe County (County) welcomes qualified solution Offerors who can demonstrate their ability to furnish software and technical labor for the procurement and implementation of an integrated JMS. The scope of this solicitation includes the following jail management modules at a minimum: Administration, Booking, Release Security, Programs, and Investigations.

The proposal shall include software, technical labor, training, hardware (as needed), and ongoing support and maintenance that meet the County's business needs as described in this RFP. Offeror may offer their proposed solutions for one (1) or more functional areas within the suite of JMS. The County requires the inclusion of professional services necessary to implement the systems being proposed by Offerors in response to RFP. The County will consider hybrid deployment options, both cloud-based and on premises, which include Software as a Service (SaaS). The County intends to integrate the requested system, including all modules, with other current core systems as well as any future systems.

B) BACKGROUND

Santa Fe County, located in New Mexico, serves a population of approximately 155,000 residents and is home to the historic City of Santa Fe, the oldest capital city in the United States. The County is governed by a five-(5) member Board of Commissioners, with day-to-day operations overseen by a County Manager. Santa Fe County values transparency, fiscal responsibility, and community engagement in its governance and service delivery.

The County operates a 24/7 detention facility and currently utilizes an on-premises JMS, along with various manual tools (e.g., Excel, Word, Outlook), and manages core detention processes such as booking, classification, housing, sentence management, incident reporting, release, and disciplinary actions, among other functions. However, the system faces significant challenges, including limited integration with critical external platforms (e.g., Keefe for commissary, Sapphire for medical records, Odyssey for court case management), frequent system instability, and outdated architecture.

The existing IT infrastructure includes a Windows-based network environment, desktop PCs, and laptops with networked printers and scanners. Wireless connectivity is available but experiences performance issues, particularly during peak usage. Mobile devices and kiosks are not currently in use for intake, release, or medical screenings. Role-based security controls and centralized document management are minimal, increasing operational risk and inefficiencies.

The County seeks to replace its current JMS with a modern, integrated, mobile-accessible system. The future solution (Appendix I) should prioritize a hybrid approach, both cloud-based and on-premises deployment (preferably SaaS), robust API-driven integration capabilities, real-time data access, enhanced role-based security, improved disaster recovery, and support for mobility in intake, release, medical, and incident tracking operations.

Santa Fe County - Background	
Inmate Population	~ 250
Annual Operating Budget, FY 2024-2025 General Government Funds	$403M $131.8M
Approximate Number of Employees (FTE)	130
Fiscal Year	July-June

C) SCOPE OF WORK

The County is seeking a comprehensive, integrated JMS that will meet its core requirements across all functional areas, including Booking, Security, Classification, Investigations, Programs, Reporting, and Administration, ideally "out of the box" with minimal modifications. The primary goal is to optimize system utilization for all users, improve response times, reduce errors, decrease manual efforts, enhance analytical capabilities, improve data security, and offer improved customer service. The County intends to minimize its total cost of ownership without compromising performance or service levels, and to implement a system that can remain on an upgrade path with minimal future cost and business impact.

The County seeks to achieve significant improvements in productivity, operational efficiency, data accuracy, and the overall ability to make informed, data-driven decisions. These improvements will be realized through the implementation of a fully integrated suite of JMS solutions.

The County intends to replace its current core JMS, X-Jail, with a proven, commercial-off-the-shelf (COTS) JMS solution. This new system will serve as a foundational component of a broader, integrated public safety and justice technology ecosystem that supports the County's long-term operational strategy. The selected JMS must support all core detention functions, including Booking, Security, Reporting, Programs, Investigations, Sentence Management, Release, and Administration. Additionally, the system must enable seamless, automated workflows that eliminate manual processes and reduce redundant data entry across departments and staff roles.

To meet modern operational standards, the proposed JMS must also integrate with the County's future-state systems to enable real-time data exchange related to inmate records, incident reports, program participation, classification updates, and other mission-critical operational data. Currently, the existing system lacks integration with key platforms such as Odyssey (court case management), Sapphire (inmate medical), Keefe (inmate financials), and video management systems like Axon and Avigilon. This lack of

integration contributes to operational silos, inefficiencies, and an increased administrative burden on facility staff.

To address these issues, the County requires the proposed JMS to include robust integration capabilities, using secure [API]s or other proven interoperability mechanisms. These integration requirements are further detailed in the attached Requirements Traceability Matrix (RTM) and must be fulfilled to ensure seamless coordination between internal and external systems. Additionally, the system must be capable of supporting a facility population of up to 600 individuals.

The County's objective is to procure a modernized, best-practices-driven JMS platform that streamlines and automates critical detention workflows, improves data quality, enhances departmental collaboration, and ensures compliance with regulatory and operational standards. The new system must provide timely, accurate, and easily accessible information to support both daily operations and long-term planning.

While the County prefers an integrated single solution, it will consider proposals that include standalone 3rd Party applications for specific functions, provided that a detailed integration plan outlining seamless data exchange and workflow automation is presented. Offerors must furnish all necessary technical labor, software, hardware, training, and implementation and integration services. The County requires Offerors to indicate the level of staffing needed for implementation and ongoing support and to estimate required staff engagement hours from County IT staff and end-users by functional area.

D) INSURANCE REQUIREMENTS

The insurance required by the Offeror is listed below.

1. General Conditions. Offerors shall submit evidence of insurance as is required herein. Policies of insurance, including cybersecurity, shall be written by companies authorized to write such insurance in New Mexico.

2. General Liability Insurance, Including Automobile. Offerors shall procure and maintain during the life of this Agreement a comprehensive general liability and automobile insurance policy with liability limits in amounts not less than one million dollars $1,000,000 combined single limits of liability for bodily injury, including death, and property damage for any one occurrence. Said policies of insurance shall include coverage for all operations performed for the County by the Offeror; coverage for the use of all owned, non-owned, hired automobiles, vehicles, and other equipment, both on and off work; and contractual liability coverage under which this Agreement is an insured contract. The County of Santa Fe shall be a named additional insured on the policy.

3. Workers' Compensation Insurance. Offerors shall comply with the provisions of the Workers' Compensation Act.

4. Cybersecurity. The Contractor shall procure and maintain during the life of this Agreement cybersecurity insurance.

5. Increased Limits. If, during the life of this Agreement, the Legislature of the State of New Mexico increases the maximum limits of liability under the Tort Claims Act (NMSA 1978, Sections 41-4-1 through 41-4-29, as amended), Contractor shall increase the maximum limits of any insurance required herein.

E) DESIGNATED PROCUREMENT SPECIALIST

The County has designated a Procurement Specialist who is responsible for the conduct of this procurement whose name, address and telephone number are listed below. All deliveries via express carrier should be addressed as follows:

Bill Taylor, Procurement Manager
Santa Fe County Purchasing Division
102 Grant Avenue, First Floor
Santa Fe, NM 87501
Phone: (505) 986-6373
Email: wtaylor@santafecountynm.gov

Any inquiries or requests regarding this procurement should be submitted to the Procurement Specialist in writing. **Offerors are permitted to include Avero Advisors on communications; however, all communication must include the Procurement Manager as the primary point of contact. No direct communication with Avero Advisors is allowed without the Procurement Manager's involvement. Other County employees do not have the authority to respond on behalf of the County. Any contact with individuals other than the Procurement Manager, without the Procurement Manager's knowledge or involvement, may be grounds for disqualification.**

F) DEFINITION OF TERMINOLOGY

This section contains definitions and abbreviations that are used throughout this procurement document.

"BCC" means the Santa Fe County Board of County Commissioners

"Close of Business" means 5:00 PM Mountain Standard Time or Mountain Daylight Time, whichever is in effect on the date given.

"Contract" or "Agreement" means a written agreement for the procurement of items of tangible personal property or services.

"Contractor" means a successful Offeror who enters into a binding contract.

"County" or "The County" means Santa Fe County.

"Determination" means the written documentation of a decision by the Procurement Manager including findings of fact supporting a decision. A determination becomes part of the procurement file.

"Desirable" The terms "may", "can", "should", "preferably", or "prefers" to identify a desirable or discretionary item or factor (as opposed to "mandatory").

"Evaluation Committee" means a body appointed by the County management to perform the evaluation of Offeror proposals.

"Finalist" is defined as an Offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee.

"JMS" refers to the Jail Management System that which the County requests proposals.

"Mandatory" The terms "must", "shall", "will", "is required", or "are required", identify a mandatory item or factor (as opposed to "desirable"). Failure to meet a mandatory item or factor will result in the rejection of the Offeror's proposal.

"Offeror" Any person, corporation, or partnership that chooses to submit a proposal.

"Procurement Manager" means the person or designee authorized by the County and the State of New Mexico to make all procurement determinations pursuant to NMSA 1978, Chapter 13 of the State Procurement Code and County Purchasing Regulations and Policies.

"Purchasing Division" means the Santa Fe County Purchasing Division, County Manager Department.

"Procurement Specialist" means the person or designee authorized by the Procurement Manager to administer and manage the procurement.

"Request for Proposals" *or* ***"RFP"*** pursuant to NMSA 1978, Section 13-1-111. Competitive sealed proposals; conditions for use and means all documents, including those attached or incorporated by reference, used for soliciting proposals.

"Responsible Offeror" means an Offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that its financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services or items of tangible personal property described in the RFP.

"Responsive Offer" or "***Responsive Proposal***" means an offer or proposal which conforms in all material respects to the requirements set forth in the request for proposals. Material

respects of a request for proposals include, but are not limited to, price, quality, quantity or delivery requirements.

III. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP contains the schedule for the procurement, describes the major procurement events, and the conditions governing the procurement.

A) SEQUENCE OF EVENTS

The Procurement Manager will make every effort to adhere to the following schedule:

	Action	**Responsibility**	**Date**
1	Issuance of RFP	Purchasing Division	07/27 & 07/28/2025
2	Pre-Proposal Conference	Owner/Offerors/Purchasing	08/05/2025
3	Acknowledgement of Receipt Form	Offerors	08/06/2025
4	Deadline to Submit Additional Questions	Offerors	08/08/2025
5	Response to Written Questions	Purchasing Division	08/15/2025
6	**Submission of Proposal (2:00 PM MST)**	**Offerors**	**09/01/2025**
7	Proposal Evaluation Review	Evaluation Committee	09/15/2025
8	Offeror Short List Identified	Evaluation Committee	09/26/2025
9	Oral Presentation / System Demos	Offeror	10/06 - 10/31/2025
10	Reference Calls	Purchasing Division	10/06 – 10/31/2025
11	Due Diligence | Final Vendor Selection	County/Purchasing	11/25
12	Contract Negotiations	County, Offeror	11/2025
13	Contract Award	Purchasing	12/2025

Note: *If the Evaluation Committee makes a selection at the Selection of Finalists, event 9 will not occur.*

Santa Fe County reserves the right, at its sole discretion, to adjust this schedule, as it deems necessary. Notification of any adjustment to the RFP Schedule of Events will be provided in the form of an "Addendum," which will be posted on the County's website at http://www.santafecountynm.gov/finance/purchasing-division/current-bid-solicitations.

It is the proposing vendor's responsibility to check regularly for addenda, clarifications, and other notifications that may be pertinent to this process.

The RFP and subsequent evaluation of proposals will allow the County to identify a Short List of vendor finalists. The Short-Listed vendors will be invited to complete an on-site (County of Sante Fe) system demonstration and oral presentation. Upon the completion of the system demonstrations, the County intends to select the vendor of choice for the system implementation.

The scripted system demonstration is not intended to be a generic demonstration of the application, but rather a demonstration of specific product functionality deemed most critical to the County. Vendors must be prepared to invest time and resources in the system demonstration to be successful with this procurement. The County will provide the agenda, demonstration scripts, use cases, and other relevant information before the scheduled demonstration.

The County expects that the foundational/basic functionality will be demonstrated along with any need for customization. The County intends to negotiate final agreements upon the selection of the vendor finalist for each of the components of the RFP. If the finalist's solution fails to satisfy the needs of the County, the County may terminate negotiations and proceed with the next highest scoring vendor.

B) EXPLANATION OF EVENTS

The following paragraphs describe the activities listed in the sequence of events shown in Section III, Paragraph A.

1. Issuance of RFP

This RFP is being issued by the Santa Fe County Purchasing Division, on behalf of Santa Fe County.

2. Pre-Proposal Conference

A Pre-Proposal Conference is scheduled to occur on the date indicated in the Sequence of Events at Section III.A. Questions may be submitted at the Pre-Proposal Conference and until the date indicated in the Sequence of Events at Section III.A. **All questions must be in writing and e-mailed to Bill Taylor,**

Procurement Manager, at wtaylor@santafecountynm.gov. A public log will be kept of the names of potential Offerors who attended the Pre-Proposal Conference and the Site Visit. Offerors are strongly encouraged to attend the Pre-Proposal Conference.

3. Acknowledgement of Receipt Form

Potential Offerors should hand-deliver, return by facsimile or e-mail the Acknowledgement of Receipt Form provided as Appendix D to have its name and firm placed on the procurement distribution list. The form should be signed by an authorized representative of the organization, dated and returned by close of business on August 6, 2025.

The procurement distribution list will be used for the distribution of written responses to questions and any RFP addenda.

4. Deadline to Submit Additional Written Questions

Potential Offerors may submit written questions regarding this RFP until the close of business on the date indicated in the Sequence of Events at Section III.A. All written questions must be addressed to the Procurement Manager, listed in Section II.E and sent via facsimile or e-mail. ***Any contact with any other County staff member or persons other than the Procurement Manager named in this solicitation may be grounds for disqualification.***

5. Response to Written Questions

Written responses to written questions and any RFP addenda will be distributed on the date indicated in the Sequence of Events at Section III.A, to all potential Offerors whose names appear on the procurement distribution list.

Additional written requests for clarification of distributed answers or addenda must be received by the Procurement Manager no later than one (1) day after the answers or addenda were issued.

6. Submission of Proposal

ALL OFFEROR PROPOSALS MUST BE RECEIVED FOR REVIEW AND EVALUATION BY THE PROCUREMENT MANAGER OR DESIGNEE NO LATER THAN 2:00 PM MST, Monday, September 1, 2025. *Proposals received after this deadline will not be accepted*. The date and time of receipt will be recorded on each proposal. Proposals must be addressed and delivered to the Procurement Manager at the address listed in Section II.E. Proposals must be sealed and labeled on the outside of the package to clearly indicate that they are in response to the County's Request for Proposals No. **Proposals may also be submitted electronically via Dropbox at the link provided below.**

https://www.dropbox.com/request/tHdKINLxTXPnmfREGpKB

Proposals must be delivered to:

Bill Taylor, Procurement Manager
Santa Fe County Purchasing Division
102 Grant Avenue (First Floor)
Santa Fe, New Mexico 87501

A public log will be kept of the names of all Offerors who submitted proposals. Pursuant to NMSA 1978, Section 13-1-116, the contents of any proposal shall not be disclosed so as to be available to competing Offerors during the negotiation process.

7. Proposal Evaluation

The evaluation of proposals will be performed by an evaluation committee appointed by the County ("Evaluation Committee"). This process will take place during the timeframe indicated in the Sequence of Events at III.A. During this time, the Procurement Manager may initiate discussions with Offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals, but proposals may be accepted and evaluated without such discussion. **Discussions SHALL NOT be initiated by the Offerors.**

8. Offeror Short List Identified

The Evaluation Committee may select and the Procurement Manager may notify the Finalist Offerors on the date indicated in the Sequence of Events at Section III.A. Only Finalists will be invited to participate in the subsequent steps of the procurement if the Finalist process is used.

9. Oral Presentations / System Demonstrations

Finalist Offerors may be required to demonstrate their proposed solutions to the Evaluation Committee. As part of the system demonstration, the Offerors are asked to provide an oral presentation addressing key aspects of their proposal. The Procurement Manager will schedule the time for each Offeror demonstration. All finalist Offerors will be contacted to schedule presentations, providing a location and instructions for the system demonstrations. Demonstrations are preferred to be conducted onsite; however, a hybrid format (both in-person and virtual) is acceptable as well.

10. Reference Calls

The references provided by the Offeror in their client reference information will be contacted as part of the evaluation process. The purpose of these reference

checks is to validate the Offeror's past performance, quality of service delivery, and adherence to schedules and budgets. The Evaluation Committee reserves the right to contact any or all references listed, as well as other known clients of the Offeror, regardless of whether they were specifically named in the proposal.

11. Final Offeror Selection

The final selection will be based on the Offeror's performance during the system demonstration. The selected Offeror should provide the best overall value and demonstrate the most effective solution aligned with the system(s) requirements. The County reserves the right to negotiate final terms and to reject any or all proposals. Finalist Offerors may be asked to submit revisions to their proposals for the purpose of obtaining best and final offers.

12. Contract Negotiations

The Contract will be finalized with the most advantageous Offeror during the timeframe indicated in the Sequence of Events at Section III.A. In the event that mutually agreeable terms cannot be reached within the time specified, the County reserves the right to finalize a Contract with the next most advantageous Offeror without undertaking a new procurement process.

13. Contract Award

The County anticipates awarding the Contract on the date in the Sequence of Events at Section III.A. These dates are subject to change at the discretion of the Santa Fe County Procurement Manager. The County reserves the right to issue a multiple award pursuant to NMSA 1978 13-1-153.

The Contract shall be awarded to the Offeror or Offerors whose proposal is most advantageous to the County, taking into consideration the evaluation factors set forth in the RFP.

While the County's preference is to award a single Contract for a comprehensive system, a multiple award may be issued to the most advantageous proposal and system for the County.

14. Right to Protest

Any protest by an Offeror must be in writing and submitted timely, pursuant to NMSA 1978, Section 13-1-172 and applicable procurement regulations. Protests must be written and must include the name and address of the protestor and the request for proposals number. It must also contain a statement of grounds for protest including appropriate supporting exhibits. The protests must be delivered to the Santa Fe County Purchasing Division:

Santa Fe County Procurement Office
Attn: Bill Taylor, CPO/ Procurement Manager
P.O. Box 276
Santa Fe, New Mexico 87504

Protests will not be accepted by facsimile or other electronic means.
Protests received after the deadline will not be accepted.

C) GENERAL REQUIREMENTS

This procurement will be conducted in accordance with: Chapter 13, NMSA 1978 (Public Purchases and Property Statute); Chapter 4, NMAC 1.4.1 et seq. (State Procurement Code); and the Santa Fe County Procurement Regulations.

Acceptance of Conditions Governing the Procurement

Offerors must indicate their acceptance of the Conditions Governing the Procurement section in the letter of transmittal. Submission of a proposal constitutes acceptance of the terms and conditions of the contract template attached hereto as **Appendix G**, some or all of which terms will be incorporated into the final contract documents to be negotiated between the County and the awarded Offeror

Incurring Cost

Any cost incurred by the Offeror in preparation, transmittal, presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror.

Prime Contractor Responsibility

Any contract that may result from this RFP shall specify that the prime contractor is solely responsible for fulfillment of the contract with the County. The County will make contract payments to only the prime contractor.

Subcontractors

Use of subcontractors must be clearly explained in the proposal, and major subcontractors must be identified by name. The prime contractor shall be wholly responsible for the performance of the contract with the County whether or not subcontractors are used.

Amended Proposals

An Offeror may submit an amended proposal before the deadline for receipt of proposals. Such an amended proposal must be a complete replacement of the previously submitted proposal and must be clearly identified as such in the transmittal letter. County personnel will not merge, collate, or assemble proposal materials.

Offerors' Rights to Withdraw Proposal

Offerors will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. The Offeror must submit a written withdrawal request signed by the Offeror's duly authorized representative addressed to the Procurement

Specialist. The approval or denial of withdrawal requests received after the deadline for receipt of the proposals is governed by the applicable procurement regulations.

Proposal Offer Firm

Responses to this RFP, including proposal prices, will be considered firm for ninety (90) days after the due date for receipt of proposals or ninety (90) days after receipt of a best and final offer if one is submitted.

Disclosure of Proposal Contents

Proposals shall not be opened publicly and shall not be open to public inspection until after an Offeror has been selected for the award of a contract.

An Offeror may request in writing non-disclosure of confidential data. Proprietary or confidential data should be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion of the proposal. Confidential data is normally restricted to confidential financial information concerning the Offeror's organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, 57-3A-1 to 57-3A-7, NMSA 1978. The price of products offered, or the cost of services proposed, shall not be designated as proprietary or confidential information.

If a request is received for disclosure of data for which an Offeror has made a written request for confidentiality, the Santa Fe County Procurement Manager shall examine the Offeror's request and make a written determination that specifies which portions of the proposal should be disclosed. Unless the Offeror takes legal action to prevent disclosure, the proposal will be disclosed. The proposal should be open to public inspection subject to any continuing prohibition on the disclosure of confidential data.

No Obligation

This procurement in no manner obligates Santa Fe County or any of its departments to the use of any proposed professional services until a valid written contract is awarded and approved by the appropriate authorities.

Termination

This RFP may be canceled at any time and any and all proposals may be rejected in whole or in part when the County determines such action to be in the best interest of the County.

Sufficient Appropriation

Any contract awarded as a result of this RFP process may be terminated if sufficient appropriations or authorizations do not exist. Such termination will be affected by sending written notice to the contractor. The County's decision as to whether sufficient appropriations and authorizations are available will be accepted by the contractor as final.

Legal Review

The County requires that all Offerors agree to be bound by the General Requirements contained in this RFP. Any Offeror concerns must be promptly brought to the attention of the Procurement Specialist.

Governing Law

This procurement and any agreement with Offerors that may result shall be governed by the laws of the State of New Mexico.

Basis for Proposal

Only information supplied by the County in writing through the Procurement Specialist or in this RFP should be used as the basis for the preparation of Offeror proposals.

Contract Terms and Conditions

The contract between the County and the Contractor will follow the format specified by the County and contain the terms and conditions set forth in **Appendix G**. The County may require a selected Offeror to modify their contract documents to be consistent with the terms and conditions set forth in **Appendix G**, subject to modifications as may be negotiated.

Contract Deviations

Any additional terms and conditions, which may be the subject of negotiation, will be discussed only between the County and the selected Offeror and shall not be deemed an opportunity to amend the proposal.

Offeror Qualifications

The Evaluation Committee may make such investigations as necessary to determine the ability of the Offeror to adhere to the requirements specified within this RFP. The Evaluation Committee will reject the proposal of any Offeror who is not a responsible Offeror or fails to submit a responsive offer as defined in Sections 13-1-83 and 13-1-85 NMSA, 1978, subject to Procurement Manager approval.

Right to Waive Minor Irregularities

The Evaluation Committee reserves the right to waive minor technical irregularities. This right is at the sole discretion of the Evaluation Committee, subject to the Procurement Manager approval.

Change in Contractor Representatives

The County reserves the right to require a change in contractor representatives if the assigned representatives are not, in the opinion of the County, meeting the County's needs adequately. Any change in the contractor representative must receive prior County approval.

Notice

The State Procurement Code, Sections 13-1-28 through 13-1-199, NMSA 1978, imposes civil and misdemeanor criminal penalties for its violation. In addition, the

New Mexico criminal statutes impose felony penalties for bribes, gratuities and kickbacks.

County Rights

The County reserves the right to accept all or a portion of an Offeror's proposal.

Right to Publish

Throughout the duration of this procurement process and contract term, potential Offerors and contractors must secure from the County written approval prior to the release of any information that pertains to the potential work or activities covered by this procurement or the subsequent contract. Failure to adhere to this requirement may result in disqualification of the Offeror's proposal or termination of the contract.

Ownership of Proposals

All documents submitted in response to this RFP shall become the property of the County. However, any technical or user documentation submitted with the proposals of non-selected Offerors shall be returned after the expiration of the protest period.

Electronic Mail Address Recommended

A large part of the communication regarding this procurement will be conducted by electronic mail (e-mail). It is recommended that the Offeror should have a valid e-mail address to receive e-mail correspondence.

Preferences in Procurement by Santa Fe County

a. ***New Mexico In-state Preference.***

New Mexico law, Section 13-1-21 NMSA 1978, provides a preference in the award of a public works contract for an "**in-state resident business**" or **"native American resident business".** Application of a resident or native American contractor preference for any Offeror requires the Offeror to provide a copy of a valid and current certificate as a resident or native American resident contractor. Certificates are issued by the state taxation and revenue department.

If an Offeror submits with its proposal a copy of a valid and current in-state resident or native American resident contractor certificate, 8% of the total weight of all evaluation factors used in the evaluation of proposals will be awarded or added to the Offeror's score.

Certification by the department of taxation and revenue for the resident or native American resident contractor takes into consideration such activities as the business' payment of property taxes or rent in the state and payment of unemployment insurance on employees who are residents of the state.

OR

b. **New Mexico Resident Veteran or Native American Resident Veteran Preference.**

New Mexico law, Section 13-1-21 NMSA 1978, provides a preference in the award of a public works contract for a "**resident veteran business**" or **"native American resident veteran business".** Certification by the department of taxation and revenue for the resident veteran business and native American resident veteran business requires the Offeror to provide evidence of annual revenue and other evidence of veteran and native American status.

An Offeror who wants the veteran or native American veteran contractor preference to be applied to its proposal is required to submit with its proposal the certification from the department of taxation and revenue and the sworn affidavit attached hereto as **Appendix E**.

If an Offeror submits with its proposal a copy of a valid and current veteran resident contractor certificate, ten percent (10%), of the total weight of all the evaluation factors used in the evaluation of proposals will be awarded or added to the Offerors' score.

The resident or native American resident contractor preference is not cumulative with the resident veteran or native American resident veteran contractor preference.

AND

c. **Santa Fe County Business Preference**

Santa Fe County Ordinance 2012-4 provides for a **County preference** for a "Santa Fe County business." Application of the County preference in procurement requires an Offeror to obtain and provide a Santa Fe County Business Certificate issued by the Santa Fe County Procurement Manager. Certification by the Procurement Manager takes into consideration the business' corporate standing in the state, business licensure or registration, the duration of the business' primary office location and the payment of taxes.

If an Offeror submits with its proposal a copy of its Santa Fe County Business Certificate issued by the Purchasing Manager, five percent (5%) of the total weight of all the evaluation factors used in the evaluation of proposals may be awarded to the Offerors' score.

The Resident Business, Resident Veteran Business or Santa Fe County Business preferences do not apply to procurement of services or goods involving federal funds or federal grant funds.

Double-Sided Documents

All bids/proposal documents submitted in writing and not electronically shall be double-sided, pursuant to Santa Fe County Resolution 2013-7, Adopting Sustainable Resource Management Principles, Section 2. A. Waste Reduction and Reuse…" all documents are to be double-sided, including those that are generated by outside entities using County funds and by consultants and contractors doing business with the County".

Living Wage

Contractor shall comply with the requirements of Santa Fe County Ordinance No. 2014-1 (Establishing a Living Wage).

Proposal Errors

Offerors are liable for all errors or omissions contained in their proposals. An Offeror shall not be allowed to alter proposal documents after the deadline for submitting a proposal.

Licensure

Before a contract pursuant to this RFP is signed, the Offeror must hold all necessary, applicable business and professional licenses. The State may require any or all Offerors to submit evidence of proper licensure.

Incorrect Proposal Information

If the County determines that an Offeror has provided, for consideration in the evaluation process or contract negotiations, incorrect information, which the Offerors knew or should have known, was materially incorrect, that proposal shall be determined non-responsive, and the proposal shall be rejected.

Proposal of Alternate Services

Proposals of alternate services (i.e., proposals that offer something different from that requested by the RFP) shall be considered non-responsive and rejected.

IV. RESPONSE FORMAT AND ORGANIZATION

A) NUMBER OF RESPONSES

Offerors shall submit only one response to this RFP.

B) NUMBER OF COPIES

If the Offeror is submitting responses in hardcopy form, Offerors shall deliver one (1) original and four (4) identical copies of their proposal to the location specified in Section II,

Paragraph E on or **before** the closing date and time for receipt of proposals. If submitting responses electronically via Dropbox, please submit two (2) separate files: one (1) file for the proposal response and a separate file for the **Appendix F** Proposed Fee Schedule.

C) PROPOSAL FORMAT

All proposals shall be limited to fifty (50) pages, with the exception to professional licenses and certifications, which shall be added as appendices. The document shall be typewritten on standard 8 1/2 x 11 paper, with a font **no smaller than 12 pt. pitch**, with nominal 1" margins and normal line spacing. If submitted in writing, proposals shall be bound with tabs delineating each section.

Submission of Proposals **will be accepted electronically** utilizing a Dropbox**.** Please utilize this link to upload your proposal submission. https://www.dropbox.com/request/tHdKINLxTXPnmfREGpKB

D) PROPOSAL ORGANIZATION

The proposal must be organized and indexed in the following format and must contain, as a minimum, all listed items in the sequence indicated.

Within each section of their proposal, Offerors should address the items in the order in which they appear in this RFP under Section V.B. EVALUATION FACTORS. All forms provided in the RFP must be thoroughly completed and included in the appropriate section of the proposal.

Any proposal that does not adhere to these requirements may be deemed non-responsive and rejected on that basis.

The **proposal summary** may be included by Offerors to provide the Evaluation Committee with an overview of the technical and business features of the proposal; however, this material will not be used in the evaluation process unless specifically referenced from other portions of the Offeror's proposal.

SECTION	TITLE
1	Letter of Transmittal
2	Response to County Terms and Conditions
3	Vendor Proposal Identification Schedule
4	Executive Summary
5	Offeror Qualifications
6	Proposed Solution(s)
7	Staffing Plan
8	Functional System Requirements
9	Implementation Plan
10	Ongoing Support Services
11	Client References
12	Offeror Contract Samples
13	Exceptions and Deviations
14	Other Required Forms and Attachments
15	Cost Proposal **(Submitted as a separate Electronic File)**
16	Campaign Contribution Disclosure Statement
17	Copy of insurance certificate

Offerors may attach other materials that they feel may improve the quality of their responses. However, these materials should be included as items in a separate appendix.

Letter of Transmittal (Proposal Section 1)

Each proposal must be accompanied by a letter of transmittal.

The letter of transmittal MUST:

A. Identify the submitting person or organization.
B. Identify the name and title of the person authorized by the organization to contractually oblige the organization.
C. Identify the name, title and telephone number of the person authorized to negotiate the contract on behalf of the organization.
D. Identify the names, titles, and telephone numbers of persons to be contacted for clarification.
E. **Explicitly** indicate Acceptance of the Conditions Governing the Procurement stated in Section III, Paragraph C.1.
F. Be signed by the authorized person to contractually oblige the organization.
G. Acknowledge receipt of any and all amendments to this RFP.

The letter shall state that the proposal remains valid for at least one hundred and eighty (180) days after the Cost Proposal opening and thereafter in accordance with any resulting contract between the Offeror and the County.

Response to County Terms and Conditions (Proposal Section 2)

Acknowledgement and acceptance of terms and conditions of the Agreement attached as **Appendix G**.

Vendor Proposal Identification Schedule (Proposal Section 3)

Vendors are required to complete the Vendor Proposal Identification Schedule (Attachment 3) to indicate which JMS solution(s) within the scope of work for the RFP they are proposing to address.

Executive Summary (Proposal Section 4)

The Offeror shall include an Executive Summary as a brief narrative describing the proposed solution(s) being offered by the Offeror. The summary should contain minimal technical jargon and should be oriented toward non-technical personnel. The

Executive Summary must not include cost quotations. It is recommended that the Executive Summary is limited to one (1) page.

Proposed Solution(s) (Proposal Section 5)

The Offeror shall provide a general description of the Proposed Solution(s), as well as technical aspects and how they will meet the requirements of RFP #. This section must address, at a minimum, the following items:

a. Describe the Offeror's overall proposed technology solution(s).
b. Describe the product direction for the company, including time frames.
c. Describe unique aspects of the Offeror's solution(s) in the marketplace.
d. Describe components of the solution(s) that are industry-standard versus proprietary to the Offeror.
e. For third-party products proposed that are integrated with the Offeror's solution(s), provide the following item for each product:
    i. The reason that this product is a third-party product versus being part of the Offeror's software solution(s).
    ii. The extent to which this third-party product is integrated with the Offeror's solution(s).
f. Storage Environment
g. Describe the proposed hybrid (Cloud-based and On-premises) solution(s) offered by the Offeror. Please describe how the County's critical data will be stored and kept safe, the backup process, the upgrade process, and all other aspects of the solution(s) offering. Detail the County's options to access or retain data for the long term. Also, break down responsibilities that the Offeror owns and those that are owned by the County.
h. Hardware
i. Describe any hardware proposed to support the end-user in operating the cloud-based solution(s).

Staffing Plan (Proposal Section 6)

The Offeror shall provide a Staffing Plan, including the designation of the Principal or Project Manager, who will have direct and continued responsibility for the project. This will be the single point of contact on all matters dealing with the project and will handle the day-to-day project management activities through completion. The Offeror must detail all personnel assigned to the proposed implementation team, including a listing of their individual job responsibilities for this project. If the Offeror is using subcontractors, please include information on subcontracting staff being used and their specific role in the project. The Offeror will be responsible for verifying the experience and qualifications for any outsourced work to subcontractors. The Offeror

is also responsible for paying its employees and any subcontractors the Offeror hires. Resumes should be included for all personnel that will be assigned to the project.

Project Manager Qualifications:

I. Be a permanent employee of the firm.
II. Oversee all aspects of the project.
III. Serve as the constant primary point of contact for the County.
IV. Minimum of ten (10) years of relevant experience.

Key Team Members Qualifications:

I. Minimum of five (5) years of relevant experience.

The Offeror shall also provide an overall project management approach, including a project organizational structure, which identifies anticipated County staff involvement during the project. Identify the roles and responsibilities of each component of this structure. This includes:

A. The number of County FTEs expected during each phase of the project
B. The functional area(s) they are expected to represent (e.g., Administration, Security, Classifications Department, and other subject matter experts)
C. The expected time commitment and roles/responsibilities of each County staff resource
D. Any assumed dependencies on County staff availability or participation for successful project execution

This will enable the County to assess internal resourcing needs and confirm alignment with the vendor's proposed implementation strategy.

Functional System Requirements (Proposal Section 7)

The Offeror is required to complete and submit a list of system requirements per proposed solution with their proposals. The list of system requirements for JMS is included in **Appendix H** (System Requirements) of the RFP.

Please note: The response to these requirements should be provided in the exact format as provided (e.g., no additional macros, formulas, extra columns, modifications, passwords, etc.). Failure to do so can result in the disqualification of the entire proposal.

Implementation Plan (Proposal Section 8)

The Offeror shall submit a narrative implementation plan, supported by an activity-level Microsoft Project Plan. While a Microsoft Project file is preferred, A PDF upload is acceptable if the vendor is selected, the County would like to have access

to the vendor's Project Plan or their chosen project management software to facilitate ease of access and collaboration. This comprehensive implementation plan should include the following elements:

a. General Implementation Approach
b. Data Conversion Plan
c. Report Development
d. Integration and Interfaces
e. Testing
f. Training
g. System Documentation and Manual
h. Disaster Recovery Plan
i. Knowledge Transfer

The Offeror should not be constrained to only include the above items in the proposal response if the provision of additional elements may add value to the overall implementation. Further information that is requested as part of Offeror's proposal:

A. General Implementation Approach (Proposal Section 8a)

The Offeror shall provide a general overview of the proposed implementation approach intended for use at the County that includes addressing the following items:

I. Describe the approach for transition from the sales cycle to the implementation phase of the project, including any pre-implementation planning.
II. Describe the project methodology as it relates to implementing a solution on time, within the proposed budget, and with the ability to meet the unique needs of a public sector client like the County.
III. Describe your approach to phasing the implementation of proposed solution(s), by functional area. What is your recommended approach for this implementation? Describe the expected level of engagement with County staff.

Any unique tools, techniques, or methods that the Offeror intends to use related to the implementation should be described in this section.

B. Data Conversion Plan (Proposal Section 8b)

The Offeror shall provide a Data Conversion Plan for assisting the County in the conversion of both electronic and manual data to the new system. It is anticipated that the County will be responsible for data extraction from current systems and data scrubbing and data pre-processing and that the Offeror will be responsible for overall data conversion coordination, definition of file layouts, and data import/migration and validation into the new solution(s). Please describe:

I. Your general approach towards data conversion and migration and how you would work with the County to conclude on what should be converted and/or migrated.
II. Your recommended approach toward retention of legacy data.

The County anticipates 5 years of inmate and incident data being converted from the legacy systems, or as otherwise agreed. The current year-to-date will also require conversion. The County asks to hold a data conversion discussion with the shortlisted Offerors.

C. Report Development (Proposal Section 8c)

The Offeror shall provide an approach to address Report Development related to the proposed solution(s). For specific reporting requirements, as detailed in **Appendix H** (System Requirements), it is anticipated that the Offeror will take the lead on developing any reports required as part of the initial deployment of the system. The Offeror is expected to provide specialized knowledge and information to the County staff during the development of needed reports, via technical training on the tools used for report development. Provide information on your reporting approach, including:

I. Description of various methods of reporting including any ad-hoc business intelligence capabilities.
II. Methods for the County to identify, specify, and develop required custom County reports during the implementation and a method for the County to create reports post-implementation.

D. Integration and Interfaces (Proposal Section 8d)

The Offeror shall provide a plan for Integration and Interfaces. It is expected that an end-user would generally need to enter data once into the systems, and that information would be accessible across systems in real-time due to integrations. Modules within the systems should be integrated in real-time with each other such that batch processes are not required to transfer information from one area of the systems to another. The Offeror must comply with the information contained in **Appendix H** (System Requirements) to meet the County's business needs.

Additionally, please describe the following items:

I. The extent to which the various modules are integrated versus being purchased separately and interfaced.
II. Your approach towards interfacing and integration with other solutions, including the use of specific tools, methods, and standards.
III. Data exchange standards (e.g., XML, Web Services, or EDI) supported or provided by your software.
IV. Potential issues for integrating with specific technologies that are used within the County.
V. Potential tools or assistance to easily incorporate customizations into new versions/releases of your software, if local customizations are made.

E. Testing (Proposal Section 8e)

The Offeror shall describe their recommended approach to the following types of testing that are anticipated to be performed as part of the implementation phase of the project, along with the level of County staff engagement in the Testing process:

I. System testing
II. Integration testing
III. Stress/performance testing
IV. User Acceptance Testing (UAT)

F. Training (Proposal Section 8f)

The Offeror shall provide the County with training programs to assure all end-users understand the core functionality of the solution(s) and can execute the associated workflows. It is important to note that the County intends to explore the advantages, disadvantages, and related costs of the following two (2) implementation training approaches:

End-user Training Approach:

All end-user and technical training will be performed on-site through implementation and will be performed by the Offeror. End-user implementation training will be provided by the Offeror and include joint participation by the relevant County process owners supporting the process area in the new software systems. Technical Implementation training will include training for County IT staff on the technologies and processes required to support the new solution(s).

Train the Trainer Approach:

The Offeror will incorporate a "train the trainer" approach where only crucial County team leaders will be trained through implementation on their modules, and then they will train the remainder of the County staff in their respective areas. This training will be provided at a County facility. Training materials supplied by the Offeror would be used by SMEs and team leads for training their staff. Web conference or remote online tutorial sessions would be available to SME and team lead staff to participate in after initial training was completed in their module.

I. Technical Implementation training will include training only the crucial IT staff to support the new systems.

The Offeror shall provide an overall description of both training methods, including the following:

I. General timeframes in which both types of training will be conducted
II. The Offeror must list the nature, level, and amount of training to be provided for both options in each of the following areas:
    a. Technical training (e.g., programming, operations, etc.)
    b. User training
    c. Other staff (e.g., executive-level administrative staff)

G. System Documentation and Manuals (Proposal Section 8g)

The Offeror shall provide user manuals and online help for use by the County as part of the initial training and ongoing operational support. Additionally, the Offeror is expected to provide technical documentation.

I. Describe what documentation (user guide, a technical guide, training materials, online resources, etc.) is readily available as part of the proposed solution(s). Any related costs should be identified in the Total Project Cost (**Appendix F**).

II. Describe what types of documentation you anticipate developing during the project.

III. Describe how updates and upgrades to modules post-go-live are communicated to users, including whether training or additional resources are provided to support these changes.

H. Disaster Recovery Plan (Proposal Section 8h)

The Offeror shall describe the Disaster Recovery Plan and associated services provided around disaster recovery, if any, as part of your proposed solution(s).

I. Business Continuity Plan (Proposal Section 8i)

The vendors shall describe the Business Continuity Plan and associated services provided to ensure continuity of operations during disruptive events, if any, as part of your proposed solution(s).

J. Knowledge Transfer (Proposal Section 8j)

The Offeror shall describe their process for ensuring that a transfer of knowledge occurs back to the County staff such that staff is capable of supporting and maintaining the application in the most proficient manner once the Offeror's implementation engagement is complete.

Ongoing Support Services (Proposal Section 9)

The Offeror shall specify the nature and conditions of any post-implementation support options, including:

I. System outages (Level 1 – System is down and requires immediate support, maximum thirty-minute (30) response time, Level 2 – Major functionality of the system is impacted, or parts of the system are down, maximum one hour (1) response time, Level 3 – non-mission critical processes are impacted, maximum of four (4) hour response time)

II. Post-go live support that is included in the proposal response. The selected vendor's implementation team shall provide comprehensive post-go-live support for a minimum period of 60 days following system go-live. This support must include hands-on assistance and user support for high-priority issues, and stabilization of system performance. The vendor must also provide prioritized support for any critical issues identified during the initial production use of the system, with dedicated resources available to

resolve issues promptly. A post-go-live support plan and staffing structure must be included in the proposal.

III. Onsite support (e.g., system tuning, application configuration, interface issues, report development, network optimization, user training and tips to optimize the user experience)
IV. Telephone support
V. Help Desk services (If there is a service level agreement for your help desk, please provide a copy with your RFP response.)
VI. Toll-free support line
VII. Users group (i.e., information about it, where it is held and when. If no, are you planning one?)
VIII. Online user community/knowledgebase (i.e., how it is accessed, who updates it, etc.)
IX. User groups and conferences

The Offeror shall also describe the "SaaS" Service Level Agreement and options with associated pricing referenced in the Total Project Cost (**Appendix F**).

Client References (Proposal Section 10)

The Offeror shall provide five (5) references including the contact names, phone numbers, email addresses, mailing addresses, contract value, JMS implemented, and a project summary from customers for whom the Offeror is currently (or has previously) provided services as required in the RFP, within the last five (5) years.

Of the five (5) client references, the Offeror shall provide three (3) of which are comparable to the County's. References will be contacted by the County to assist with the evaluation of experience, expertise, and customer satisfaction. Comparable client references should demonstrate a similar scale to the County, in terms of population served, operating budget, number of employees, functional areas, etc. Each reference must be willing to make themselves available for a conference call and a possible site visit. Furthermore, the County would prefer to have at least one vendor reference from a New Mexico-based client.

Offeror Contract Samples (Proposal Section 11)

The Offeror shall provide its sample contract template typically used for the services it is offering, including but not limited to Software License, SaaS fees, 3rd Party Agreements, Maintenance, Services, Service Level Agreements, Remote Access, etc., as may be applicable. These contracts will be negotiated with the Contractor(s) and therefore the samples are not expected to be filled out specifically for the County, but will instead be used to provide example templates that may or may not be used, in whole or in part, for negotiating final contracts. The final contracts may include performance criteria and penalties for non-performance of services.

Exceptions and Deviations (Proposal Section 12)

The Offeror shall provide a written description of any exceptions and deviations to the requirements of this RFP solicitation. This section will be all-inclusive and will contain a definition statement of every objection or deviation with adherence to specific sections within the RFP. Objections or deviations expressed only in other parts of the proposal, either directly or by implication, will not be accepted as deviations, and the Offeror submitting a proposal will accept this stipulation without recourse.

Other Required Forms and Attachments (Proposal Section 13)

Please provide all other required forms in this section, including, but not limited to:

- Certificate of Compliance

Cost Proposal (Submitted as a separate, electronic file)

The Offeror shall prepare a separate, stand-alone Cost Proposal, as defined above in **Appendix F,** which offers itemized pricing (through Go-Live, along with re-occurring annual costs), for all software, hardware, proposed services, and different maximum amount for travel expenses, including, but not limited to, the following costs:

A. "Software as a Service" license with software assurance B. Additional software modules (by functional area) C. Implementation (including data conversion and migration), if separate from the other costs. D. Annual support and SaaS Upgrades	E. Software integration F. Hardware integration (as needed) G. Data Conversion H. Training I. Travel Expenses

V. SPECIFICATIONS

Offerors should respond in the form of a thorough narrative to each mandatory specification. The narratives, along with required supporting materials, will be evaluated and awarded points accordingly.

A) INFORMATION

Time Frame

The contract is scheduled to begin in December 2025. Santa Fe County intends to award a contract with an initial term of four (4) years.

B) EVALUATION CRITERIA

A brief explanation of each mandatory specification is listed below. Offerors are encouraged to fully address each category completely, as points are assigned for responses to each.

Section 6 – Proposed Solution(s)

- Clearly describe the overall proposed technology solution and its ability to meet the County's RFP requirements.
- Summarize the solution's product roadmap, including timeframes for key developments.
- Highlight any unique capabilities or differentiators in the marketplace.
- Specify which components are proprietary and which are industry-standard.
- For any proposed third-party tools:
    - Justify why a third-party product is used instead of native functionality.
    - Explain how tightly the product is integrated with the Offeror's solution.
- For the Cloud solution:
    - Describe data storage, backup, upgrades, long-term access, and security.
    - Define which responsibilities belong to the Offeror vs. the County.
- Identify any hardware requirements needed for end-users to access the solution.

Section 7 – Staffing Plan

- Identify a Project Manager who is a permanent employee, has at least 10 years of experience, and will serve as the single point of contact.
- List all key personnel with their specific project roles and relevant experience (minimum 5 years for key team members).
- Include resumes for all assigned staff.
- Disclose any subcontractors, including their roles and how their experience is verified.

- Present a clear project organizational structure, with expected County staff involvement.

Section 8 – Functional System Requirements

- Submit responses in the exact format of Appendix H, with no added columns, formulas, or modifications.
- Fully complete the system requirements list for each proposed solution.
- Ensure the response demonstrates compliance with all listed functional requirements.

Section 9 – Implementation Plan

- Provide a narrative implementation approach tailored to a public sector client, addressing timeline, budget, and requested scope of work.
- Describe the phasing of implementation by functional area, and the level of County staff engagement.
- Explain the data conversion/migration plan:
  - Plan for converting 2–5 years of data.
  - Retention strategy for legacy data and making it available for reference purposes.
  - Collaboration approach and plan for data mapping and validation.
- Describe the report development process:
  - Plan for a minimum of 100 custom reports across complexity levels.
  - Methods for identifying required reports, differentiating standard vs. custom.
  - Approach for post-implementation report development and training.
  - List of available out-of-the-box reports
- Describe the integration/interface strategy:
  - Degree of native module integration vs. separate interfaced components.
  - Supported data exchange methods (e.g., Web Services, XML).
  - Compatibility with existing County systems and approach for integration.
- Outline testing methodology:
  - Include system testing, integration, performance/stress testing, and UAT.
  - Clarify County's role in each testing phase.
- Describe training options for both End-user and Train-the-Trainer models:
  - Delivery method, timing, materials, and post-implementation support.
  - Specify training for technical, functional, and executive users.
- Describe available documentation (user manuals, technical guides, etc.) and how updates will be communicated and supported.
- Provide disaster recovery and business continuity plans.

- Explain how knowledge will be transferred to ensure the County can independently support and maintain the system post-implementation.

Section 10 – Ongoing Support Services

- Detail response times for system support based on severity levels.
- Describe post-go-live support services for at least 60 days, including end user support.
- Explain staffing structure and availability of dedicated support resources during stabilization.
- Describe ongoing support options, including onsite support, telephone and help desk services, user groups, and knowledge base access.
- Include details about the SaaS Service Level Agreement and pricing.

Section 11 – Client References

- Provide five (5) complete client references, including three (3) comparable counties and one New Mexico-based client if available.
- References should be of similar scale and include full contact info, contract value, and project summary.
- Confirm reference availability for follow-up interviews or site visits.

C) COST PROPOSAL

(Appendix F) - please submit in a separate file in **Dropbox** and if submitting additional paper copies, provide it in a separate sealed envelope with the original proposal ONLY (do not include in each of the eight additional copies, if submitting electronically. Offeror shall propose its cost for the tasks listed in the scope of work. A sample cost sheet is provided as **Appendix F**. Please use the **Dropbox** link to access the Microsoft Excel version of the Cost Proposal template **(Attachment 1)** referenced in **Appendix F**.

VI. EVALUATION

A. EVALUATION SCORING

All scores for each vendor shall be added together to arrive at a final score for each proposal. Proposals will then be ranked in descending order by the total proposal score. The County reserves the right not to enter into any contract as a result of this bid invitation.

Proposal Evaluation

The County's Evaluation Committee will conduct a detailed Proposal Evaluation of the vendors' proposals once the submission period closes to determine basic responsiveness to stated minimum requirements. The evaluation will determine whether they are complete, that the documents have been properly signed, and that they are generally in order. Proposals that are not deemed complete will be removed from consideration and will not be reviewed by the County's Evaluation Committee. During the Proposal Evaluation, each Evaluation Committee Member will score the vendor's proposals using a proposal evaluation matrix form based on the Evaluation Criteria detailed below. All individual Evaluation Committee Member ratings are then added together to create a composite rating. This composite rating indicates the group's collective ranking of the highest-rated proposals. The highest-rated proposals will be short-listed and will move on to System Demonstrations.

Proposal Evaluation Metric	Weight
Transmittal Letter (Section 1)	Pass / Fail
Staffing Plan (Section 7)	100 Points
Implementation Approach (Sections 6, 9, 10)	400 Points
Response to Functional System Requirements (Section 8)	300 Points
Client References (Section 11)	100 Points
Cost Proposal (Stand-Alone Document)	100 Points
Total Points	1,000 Points

Proposal Evaluation Metric (Preference Points)	Weight
New Mexico Resident or Native America Resident Business Certificate	80
Resident Veteran or Native America Veteran Business Certificate	100
Valid Santa Fe County Business Certificate	50

PREFERENCES

If a proposal contains an In-State Resident Business Certificate or Resident Veterans Business Certificate and/or Santa Fe County Business Certificate, the applicable preference will be applied. The applicable preference will be applied as additional bonus points, awarded separately from the total evaluation score.

1. Proposal contains a valid N.M. Resident or native American Resident Business Certificate……..……**80 points**

OR

2. Proposal contains a valid Resident Veteran or native American Veteran Business Certificate……**100 points**

AND

3. Proposal contains a valid Santa Fe County Business Certificate……**50 points**

A) EVALUATION PROCESS

The evaluation process will follow the steps listed below:

1. All proposals will be reviewed for compliance with the mandatory specifications stated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration.

2. The Procurement Specialist may contact the Offeror for clarification of the response as specified in Section III, Paragraph B.7.

3. The Evaluation Committee may use other sources of information to perform the evaluation as specified in Section III, Paragraph C.18.

4. Responsive proposals will be evaluated using the factors in Section V. The responsible Offerors with the highest scores will be selected as finalist Offerors based upon the proposals submitted. Finalist Offerors who are asked or choose to submit revised proposals for the purpose of obtaining the best and final offers will have their points recalculated accordingly. The responsible Offeror whose proposal is most advantageous to the County, taking into consideration the evaluation factors in Section VI, will be recommended for contract award as specified in Section III, Paragraph B.12. Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.

5. Past performance in a project for the County (See Section V.C.3 above) is a significant consideration of the evaluation and poor performance on a prior County

project may result in a lower number of points awarded to a proposal for this element of the evaluation.

APPENDIX A

CURRENT ENVIRONMENT (AS-IS)

Objective [1.1]

The purpose of Appendix A– Current Environment is to provide an overview of Santa Fe County's current JMS. This section includes summaries of the enterprise systems currently in use, the technical infrastructure supporting these systems, and the "As-Is" functional workflows of key areas within the County's Adult Correctional Facility.

In addition to identifying the current business processes, this section also highlights known limitations, manual workarounds, and integration gaps that impact the County's ability to operate efficiently and in compliance with regulatory requirements. These observations were collected through a series of on-site discovery sessions with jail staff, supervisors, administrative leadership, program managers, and investigators.

The following core operational areas are included in this Current Environment summary and are expected to be directly impacted by the County's selection of a new, integrated JMS:

A. Booking & Intake Operations:
Including identity verification, property and money intake, manual data entry from handwritten forms, medical screening (via Sapphire), and initial records creation.

B. Inmate Release & Court Processing:
Covering audit workflows, NCIC warrant checks, charge prioritization, court paperwork processing, release date calculation, and Keefe financial adjustments.

C. Security & Facility Operations:
Including housing assignments, headcounts, inmate movement, incident tracking (currently performed outside JMS), and Guardian-based unit-level logging.

D. Classification, Programs & Reentry:
Encompassing inmate classification scoring, override processes, committee documentation, PREA compliance tracking, work assignments (Porter/Trustee), and inmate program participation.

E. Investigations, Compliance & Administration:
Including staff and inmate investigations, incident documentation, disciplinary sanction tracking, fire safety inspections, OSHA compliance, and data requested for public records (IPRA).

F. System & Technical Infrastructure:

Overview of Santa Fe County's current JMS (X-Jail), associated platforms (Sapphire, Keefe, Guardian, Odyssey, Axon, Avigilon, ICS), and existing deficiencies in interoperability, reporting, and user experience.

It is important to note that Santa Fe County expects all Offerors to read this Current Environment overview thoroughly. The County's new JMS solution must address the identified functional gaps and technical limitations described in this section and align with Santa Fe County's vision for a modern, integrated, hybrid, and mobile-accessible jail operations platform.

Failure to read, understand, and respond to the needs and challenges outlined in this section may result in a non-compliant proposal that will be disqualified from further consideration.

Functional Areas [2.1]

This subsection provides a summary of the current state of operations across the primary functional areas within Santa Fe County's Adult Correctional Facility. These operational domains are central to jail operations and will be directly impacted by the implementation of a new JMS. Each area includes multiple sub-processes that were evaluated during discovery sessions, with key workflows, gaps, and system limitations identified.

The following functional areas are within the scope of the proposed JMS solution:

Administration Department:

- Operational Reporting & Compliance
- Audit Preparation & Oversight
- Investigative & Legal Documentation
- Reporting System Oversight
- Compliance Task Tracking

Booking Department:

- Intake Process
- Medical Screening Coordination
- Property and Financial Intake
- Profile Creation and Identity Resolution

- Intake Documentation and Auditing
- Charge Prioritization and Billing Management
- Court Documentation Processing
- Sentence Tracking and Maintenance
- Inmate Release Coordination

Classifications Department:

- Initial Classification & Custody Assignment
- Risk Flagging & Alerts
- Reclassification Management
- Override Processing
- Housing Coordination & Move Sheets
- PREA Integration & Support

Investigations Department:

- Inmate & Staff Investigations
- PREA Case Management
- Disciplinary Review & Case Tracking
- Grievance Oversight
- Legal & Records Support

Programs Department:

- Inmate Job Assignment (Porter/Trustee Program)
- Program Scheduling & Participation
- Eligibility Verification
- Performance Tracking
- Porter Pay Coordination
- Committee Hearings (SMU Review)

Security Department:

- Inmate Movement & Housing Transfers

- Headcounts & Unit Checks
- Incident Response & Documentation
- Disciplinary Actions
- Property Handling
- Restricted Housing & Behavioral Monitoring

Administration Department [2.2]

The Administration Department at the Santa Fe County Adult Correctional Facility plays a central role in maintaining jail-wide reporting, compliance documentation, audit support, and oversight of operational data within the JMS. The department is responsible for generating routine and ad hoc reports, maintaining regulatory documentation, and preparing data for internal leadership, external oversight bodies, and legal inquiries. Administrative personnel ensure that jail operations are traceable, policy-aligned, and supported by complete, validated records.

Operational Reporting & Compliance

The Administration team produces a wide range of recurring reports that support day-to-day operations, policy enforcement, and legal compliance. These include classification summaries, disciplinary sanction logs, daily admission and release reports, and RHU (Restricted Housing Unit) housing rosters. Staff validate, format, and submit these reports to internal stakeholders, oversight bodies, and state agencies. Reports such as the SC51 are compiled to meet New Mexico Association of Counties requirements and are used to demonstrate compliance with jail operation standards.

Audit Preparation & Oversight

The department supports ongoing audits and inspections by collecting and compiling data from across housing, booking, classification, and disciplinary functions. This includes verifying housing durations, identifying incomplete classifications, and assembling supporting documentation. Jail staff rely on administrative personnel to coordinate submissions and produce accurate documentation during scheduled or surprise audits.

Investigative & Legal Documentation

Administrative staff provide report access and supporting documentation for internal investigations and public records requests (IPRA). They ensure relevant reports and historical records are discoverable and accurately reflect event

timelines, housing status, or disciplinary decisions. When requested, administration personnel support legal staff and internal affairs by exporting incident history, classification changes, and compliance logs from JMS.

Reporting System Oversight

The Administration Department manages report inventory within JMS and helps configure access based on user roles. Staff ensure that data is entered consistently, and that reporting modules are properly used across departments. This includes distributing updated procedures for generating reports, organizing shared data libraries, and flagging inconsistencies that may affect report integrity.

Compliance Task Tracking

Beyond standard reporting, the department also oversees the documentation of required safety and sanitation inspections, fire drills, and environmental audits. These logs are submitted to internal leadership and are stored for historical reference. While many of these tasks originate outside JMS, their outcomes must align with data stored in the system.

Current Business Technologies: X-Jail, Microsoft Excel, Microsoft Word, shared network drives, Avigilon, Axon, Sapphire, Keefe, and physical inspection binders.

Current Key Gaps:

- **Fragmented Report Access:** Reports are difficult to locate within JMS due to poor labeling and an overwhelming number of templates.
- **Limited Dashboard Customization:** There is no centralized reporting view tailored to administrative roles or responsibilities.
- **Unstable Report Generation:** Report queries exceeding five (5) days often crash the system, limiting visibility over trends.
- **No Integration with Evidence Platforms:** Photos, videos, and other attachments must be retrieved separately and cannot be uploaded to JMS.
- **Disorganized Report Inventory:** Over 1,000 reports exist in JMS, many of which are redundant or obsolete.
- **Inconsistent Compliance Logging:** Fire and sanitation inspections are not linked to JMS, making status tracking difficult.

- **No Centralized Investigation Archive:** Investigative documentation and compliance audits rely on external logs and paper records.
- **No Audit Trail for Review Approvals:** JMS lacks workflow visibility to confirm that key reports have been reviewed or signed off by required personnel.

Booking Department [2.3]

The Booking Department at the Santa Fe County Adult Correctional Facility manages all intake, identification, and release processes. This team is the central gateway through which all inmates are processed into custody, verified, documented, and eventually released. Their responsibilities are critical to ensuring legal compliance, operational continuity, data accuracy, and timely processing of all custody-related functions.

Intake Processing

Booking staff receive intake documentation from arresting officers and validate identifiers such as name, date of birth, Social Security number, and known aliases. Arrest documents, including warrants and charging paperwork, are reviewed for completeness. Data is entered into the JMS, and clerks verify whether the individual has an existing profile. If so, the profile is updated and consolidated; if not, a new record will be created. Key demographic information, photos, fingerprints, and biometric data are collected and linked to the profile. All known aliases, alerts, and prior booking details are confirmed for consistency.

Medical Screening Coordination

Prior to acceptance into custody, all individuals must undergo medical screening conducted by nursing staff via the Sapphire system. The Booking Department confirms that medical clearance has been completed and recorded before proceeding with intake. The team ensures medical status is captured within JMS and coordinates with nursing staff if screening data or clearance forms are delayed

Property and Financial Intake

Booking officers collect personal property and funds from incoming individuals. Property is logged for storage, and financial deposits are entered into the Keefe kiosk system. Clerks ensure that funds are associated with the correct JMS profile. When necessary, booking staff assist in reconciling financial records between systems and addressing issues such as returns for rejected intakes or duplicate entries.

Profile Creation and Identity Resolution

Booking clerks confirm whether an incoming individual has an existing record in JMS. If prior bookings exist, the record is updated and consolidated. Clerks confirm identity through detailed cross-checking and ensure that all information, such as aliases, classification history, and behavioral records, is retained under a single, unified inmate profile.

Intake Documentation and Auditing

The Booking Department is responsible for maintaining complete documentation of each intake. This includes ensuring that all forms (e.g., property logs, medical clearance, arrest paperwork) match JMS entries. Clerks print, file, and review all documents to ensure intake completeness. Discrepancies must be addressed and corrected prior to release into housing.

Charge Prioritization and Billing Management

Individuals may enter custody with multiple warrants or charges from different jurisdictions. Booking clerks are responsible for establishing initial charge prioritization, identifying which agency is currently responsible for custody and billing. When primary charges are resolved or dismissed, booking staff coordinate the transition of billing responsibility to subsequent agencies.

Court Documentation Processing

Clerks are responsible for reviewing and processing all court documents, including release orders, sentencing updates, holds, and warrants. These documents are reviewed, scanned, and linked to inmate records in JMS. Booking ensures documents are routed to the appropriate parties and stored for future reference and audits.

Sentence Tracking and Maintenance

Booking clerks are responsible for entering and updating sentence information, including start dates, time served, earned credits, and scheduled release dates. This function ensures custody status is correctly documented and reflected in JMS and supports downstream activities such as classification, housing, and reentry planning.

Inmate Release Coordination

Releases are processed following completion of sentence, posting of bond, court orders, or inter-agency transfers. Booking staff verify that all release conditions are met, conduct audits of the inmate’s physical and digital file, confirm clearance of

all detainers, and coordinate with the Sheriff's Office or external agencies when inter-jurisdictional transfers are required.

Primary Business Technologies: JMS, Microsoft Excel, Microsoft Word, Keefe, Sapphire, Guardian, digital cameras, and paper-based intake packets.

Current Key Gaps:

- **Manual and Duplicative Data Entry:** Intake and court documents are handwritten and transcribed into JMS.
- **No Automated Identity Resolution:** Existing profile matches must be manually located and merged.
- **Lack of System Integration:** Keefe, Sapphire, Odyssey (court), and Guardian are not connected to JMS.
- **Charge Prioritization Manual:** Billing transitions require manual reassignment and tracking.
- **Court Document Reconciliation Delays:** Incorrect case numbers or missing files often delay releases.
- **No Sentence Calculation Tools:** Staff rely on manual calculations and a physical release board.
- **System Instability:** JMS frequently crashes, especially during peak intake periods.
- **Disjointed Data Entry:** Medical, property, and financial data must be entered in separate system areas.
- **Delayed Financial Reconciliation:** Offline Keefe entries are tracked by hand and reconciled later.
- **No Real-Time Intake Workflow Dashboard:** Staff have no visibility into pending steps or task statuses.
- **No Field Validation:** JMS allows intake to proceed even when required data is incomplete.
- **Duplicate Profiles Common:** No built-in alerts to prevent redundant record creation.

Programs Department [2.5]

The Programs Department at the Santa Fe County Adult Correctional Facility is responsible for managing inmate work assignments, educational and behavioral

programming, and coordination of Special Management Unit (SMU) Committee Hearings. The department ensures that job eligibility, participation tracking, and custody-level restrictions align with classification and disciplinary status. Programs staff collaborate with other departments to support structured time management and program access across housing units.

Inmate Job Assignment (Porter/Trustee Program)

Program staff assign inmates to work roles such as housing porters, kitchen porters, and cleaning crews. Assignments are based on behavior, charge type, sentence length, and classification status. Work logs and timesheets are maintained by housing unit staff and submitted to Programs for validation and pay processing.

Program Scheduling & Participation

Staff coordinate education, religious services, and structured group programming. Attendance is tracked by facilitators, and eligibility is reviewed against classification and housing restrictions. Behavioral incidents or changes in custody level may impact access.

Eligibility Verification

Prior to assignment, inmates are screened for job or program eligibility using criteria including classification level, sentence status, recent misconducts, medical clearance (via Sapphire), and PREA restrictions. Staff coordinate with medical, classification, and housing to confirm clearance.

Performance Tracking

Porter timesheets are compiled weekly and submitted to the classification supervisor. Programs staff reconcile hours worked with approved pay and submit the information for processing through Keefe. Documentation is reviewed to prevent overpayment or falsified hours.

Porter Pay Coordination

Each unit maintains its own porter's pay spreadsheet, and supervisors submit compiled timesheets to the classification supervisor. Pay is managed through Keefe, with staff responsible for ensuring that timesheets match assignments and that pay is properly allocated. Inmates may forge names or work hours, requiring verification through cameras and supervisor review.

Committee Hearings (SMU Review)

Programs staff organize and lead weekly SMU Committee Hearings, reviewing inmates placed in restricted housing. The process includes preparing committee

forms, verifying attendance requirements, coordinating medical, mental health, and classification of staff, and facilitating the meeting. Inmates are offered hygiene assessments, fire evacuation explanations, and department-specific services. Decisions on continued placement, release, or reclassification are documented, signed, entered in JMS notes, and shared with leadership in formal reports.

Current Business Technologies: JMS, Microsoft Excel, Microsoft Word, Outlook, Keefe, Sapphire, and printed committee review forms.

Current Key Gaps:

- **No Program Module in JMS**: Job assignments and attendance are tracked outside the system.
- **Decentralized Porter Logs**: No unified view of current porter assignments or history.
- **No Clearance Workflow Automation**: Medical and classification checks are completed manually.
- **Duplicative Committee Documentation**: Forms are handwritten, then re-entered into JMS.
- **No Centralized Dashboard**: No reporting or real-time visibility for program or SMU status.
- **Manual Security Coordination**: Committee attendance relies on color-coded logs and paper forms.
- **No Digital Archive for Hearings**: Completed forms are stored in binders and filed in booking.
- **No Notification of Integration**: Inmates are notified of committee meetings in person; no JMS alerts.

Security Department [2.6]

The Security Department at the Santa Fe County Adult Correctional Facility is responsible for maintaining the safety and orderly operations of the facility. This includes supervision of housing units, inmate movement, property handling, headcounts, incident response, and documentation of disciplinary actions. Security staff interact with nearly every component of the JMS by logging daily activity, managing housing assignments, and supporting custody decisions through incident and behavioral documentation. The department also supports investigations, transport coordination, and oversight of restricted housing.

Inmate Movement & Housing Transfers

Security personnel manage all inmate movement within the facility, including housing reassignments, court transports, medical appointments, and program-related transfers. All moves are entered into JMS individually and communicated via Guardian handhelds. Staff also maintain out-counts for inmates temporarily assigned to external locations such as courts or hospitals.

Headcounts & Unit Checks

Routine and special headcounts are conducted daily using Guardian handhelds. Unit checks, observation logs, and wellness rounds are tracked as part of facility safety protocols. These entries serve as a real-time record of inmate presence and are referenced for compliance and investigation purposes.

Incident Response & Documentation

Security staff respond to incidents involving inmate behavior, use of force, fights, or violations of facility policy. Officers draft initial reports in Microsoft Word, while only summary information (e.g., guilty findings) is entered into JMS. Video from Axon body cameras and Avigilon security systems is stored separately and not linked to incident records.

Disciplinary Actions

Disciplinary violations are reported by security officers and processed through an administrative review. Security staff deliver hearing notifications, serve sanctions, and enter findings into JMS. Final sanctions are tracked in Excel or paper logs and used to inform classification, program eligibility, and risk management.

Property Handling

Security staff log inmate property upon intake and during cell searches or housing transitions. Property is reconciled against JMS entries and stored according to custody status. Discrepancies in tracking may result in inventory issues or delays in property release.

Restricted Housing & Behavioral Monitoring

Security manages RHU placements based on behavior, disciplinary actions, or PREA risk. Unit logs, observation checks, and compliance reports are completed for inmates in restricted housing. These reports are submitted to the administration and used in compliance monitoring.

Current Business Technologies: JMS, Guardian, Microsoft Word, Microsoft Excel, Axon (body cameras), Avigilon, Keefe, and paper-based logs and forms.

Current Key Gaps:

- **No Batch Movement Functionality:** Inmates must be moved individually in JMS, even for dorm-wide transfers.
- **No Real-Time Integration with Guardian:** Movement, headcount, and logs are not synced automatically with JMS.
- **Disjointed Incident Reporting:** Officer reports are created in Word and manually transferred or summarized in JMS.
- **Video Evidence Not Linked:** Security footage and body cam video must be retrieved manually and are not associated with JMS records.
- **No Centralized RHU Tracking:** RHU assignments and observations are logged separately and not consolidated for audit or compliance.
- **Lack of Property Status Visibility:** JMS does not accurately reflect real-time property storage status, causing inventory discrepancies.
- **No Automated Conflict Alerts:** Housing placements do not trigger warnings for enemies, gang affiliations, or known risk flags.
- **Limited Workflow Enforcement:** Required steps for housing reviews or disciplinary hearing documentation are not enforced within JMS.

APPENDIX B

Current Business Systems

SYSTEMS & APPLICATIONS	FUNCTIONS
X-Jail	Primary JMS, including booking, classification, housing, and incident tracking.
Sapphire	Medical system for inmate screenings and clearances.
Odyssey	Court case tracking and sentencing records.
Keefe (Kiosk)	Inmate financial accounts, inmate communications and grievances, and commissary.
Guardian	Inmate movement, housing, and security tracking.
Avigilon	Security camera system.
Axon	Body camera footage movement.
Inmate Communication System (ICS)	Phone and messaging system for inmate communications.

APPENDIX C

ACKNOWLEDGEMENT OF RECEIPT FORM
Acquisition and Implementation of a Jail Management System
RFP NO. 2026-0023-PSD

In acknowledgement of receipt of this Request for Proposal, the undersigned agrees that he/she has received a complete copy, beginning with the title page and table of contents, and ending with Appendix C.

The acknowledgement of receipt should be signed and returned to the Procurement Specialist no later than close of business on **August 6, 2025**. Only potential Offerors who elect to return this form completed with the indicated intention of submitting a proposal will receive copies of all Offeror written questions and the County's written responses to those questions as well as RFP amendments, if any are issued. Note: Failure to submit the Acknowledgement of Receipt Form does not preclude any Offerors from submitting a proposal.

FIRM: _____

REPRESENTED BY: _____

TITLE: _____ PHONE NO.: _____

E-MAIL: _____ FAX NO.: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

SIGNATURE: _____ DATE: _____

This name and address will be used for all correspondence related to the Request for Proposal.

Firm does/does not (**circle one**) intend to respond to this Request for Proposals.

Bill Taylor, Procurement Specialist Senior
Santa Fe County Purchasing Division
102 Grant Avenue (First Floor)
Santa Fe, New México 87501
Phone: (505) 986-6373
Email: wtaylor@santafecountynm.gov

APPENDIX D

CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, § 13-1-191.1 (2006), any Person seeking to enter into a contract with any state agency or local public body **for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources** must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole-source contract. The Prospective Contractor must disclose whether they, a Family Member or a Representative of the Prospective Contractor has made a Campaign Contribution to an Applicable Public Official of the state or a local public body during the two years prior to the date on which the Prospective Contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the Prospective Contractor signs the contract, if the aggregate total of Campaign Contributions given by the Prospective Contractor, a Family Member or a Representative of the Prospective Contractor to the public official exceeds two hundred and fifty dollars ($250) over the two (2) year period.

Furthermore, the state agency or local public body shall void an executed contract or cancel a solicitation or proposed award for a proposed contract if: 1) a Prospective Contractor, a Family Member of the Prospective Contractor, or a Representative of the Prospective Contractor gives a Campaign Contribution or other thing of value to an applicable public official or the applicable public official's employees during the Pendency of the Procurement Process or 2) a Prospective Contractor fails to submit a fully completed disclosure statement pursuant to the law.

THIS FORM MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

"**Applicable Public Official**" means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal, or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

"**Campaign Contribution**" means a gift, subscription, loan, advance, or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official's behalf for the purpose of electing the official to either statewide or local office. "Campaign Contribution" includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political

committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

"**Family Member**" means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law.

"**Pendency of the Procurement Process**" means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

"**Person**" means any corporation, partnership, individual, joint venture, association or any other private legal entity.

"**Prospective Contractor**" means a person who is subject to the competitive sealed proposal process set forth in the State Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

"**Representative of a Prospective Contractor**" means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

DISCLOSURE OF CONTRIBUTIONS:

Contribution Made By: _____

Relation to Prospective Contractor: _____

Name of Applicable Public Official: _____

Date Contribution(s) Made: _____
_____

Amount(s) of Contribution(s) _____
_____

Nature of Contribution(s) _____
_____

Purpose of Contribution(s) _____
_____

(Attach extra pages if necessary)

_____ _____
Signature Date

_____
Title (position)

--OR—

NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS ($250) WERE MADE to an applicable public official by me, a family member or representative.

_____ _____
Signature Date

_____

APPENDIX E

RESIDENT VETERANS PREFERENCE CERTIFICATION

_____ (NAME OF CONTRACTOR) hereby certifies the following in regard to application of the resident veterans' preference to this procurement.

Please check one box only:

☐ I declare under penalty of perjury that my business prior year revenue starting January 1 and ending December 31 is less than $1M, allowing me the ten percent (10%) preference discount on this solicitation. I understand that knowingly giving false or misleading information about this fact constitutes a crime.

"I agree to submit a report or reports to the State Purchasing Division of the General Services Department declaring under penalty of perjury that during the last calendar year starting January 1 and ending on December 31, the following to be true and accurate:

"In conjunction with this procurement and the requirements of this business application for a Resident Veteran Business Preference/Resident Veteran Contractor Preference under Sections 13-1-21 or 13-1-22 NMSA 1978, which awarded a contract which was on the basis of having such veterans preference, I agree to report to the State Purchasing Division of the General Services Department the awarded amount involved. I will indicate in the report the award amount as a purchase from a public body or as a public works contract from a public body as the case may be."

"I understand that knowingly giving false or misleading information on this report constitutes a crime".

I declare under penalty of perjury that this statement is true to the best of my knowledge. I understand that giving false or misleading statements about material fact regarding this matter constitutes a crime.

_____ _____

(Signature of Business Representative)* (Date)

*Must be an authorized signatory of the Business.

The representations made in checking the boxes constitutes a material representation by the business that is subject to protest and may result in denial of an award or un-award of the procurement involved if the statements are proven to be incorrect.

SIGNED AND SEALED THIS_____DAY OF _____, 2020.

_____

NOTARY PUBLIC

My Commission Expires:

APPENDIX F

COST PROPOSAL

	FY 26	FY 27	FY 28	FY 29	Total
One-time Costs					
Infrastructure (On Premises Only):					
Servers					$0
OS Licenses					$0
Database Licenses					$0
Product Licenses					$0
Proprietary End Point Devices (Describe)					$0
Professional Services:					
Business Process Analysis and Re-engineering					$0
Solution Configuration					$0
Custom Software Development					$0
Data Conversion/Migration – Open Activities					$0
Data Conversion/Migration – History					$0
Training					$0
Project Management					$0
Integration with Business Applications:					
Other Costs (Describe)					
					$0
Total One-time Costs:	**$0**	**$0**	**$0**	**$0**	**$0**
Ongoing Costs					
Software Subscription (if applicable)					$0
Third Party Licenses					$0
Maintenance and Support (if not included in above)					$0
Other Costs (Describe)					$0
					$0
					$0
					$0
Total Ongoing Costs:	**$0**	**$0**	**$0**	**$0**	**$0**
Total Project Costs:	**$0**	**$0**	**$0**	**$0**	**$0**

APPENDIX G

SAMPLE AGREEMENT

SERVICE AGREEMENT
BETWEEN SANTA FE COUNTY AND
[NAME OF CONTRACTOR]
FOR [GOODS OR SERVICES]

THIS AGREEMENT is made and entered into this _____ day of _____ 20__, by and between **SANTA FE COUNTY**, hereinafter referred to as the "County" and **[CONTRACTOR'S NAME]**, whose principal address is **[CONTRACTOR'S ADDRESS]** hereinafter referred to as the "Contractor".

WHEREAS, pursuant to [PROCUREMENT DELIVERY METHOD USED PURSUANT TO THE STATE PROCUREMENT CODE, COUNTY PURCHASING REGULATIONS/POLICIES]; and

WHEREAS, the [BACKGROUND OR DESCRIPTION OF THE COUNTY'S NEEDS AND REQUIREMENTS]; and

WHEREAS, the [BACKGROUND/BRIEF DESCRIPTION OF THE CONTRACTOR'S ABILITIES/QUALIFICATIONS]; and

WHEREAS, **[**GENERAL PURPOSE OF THIS AGREEMENT]; and

WHEREAS, the County requires the services of the Contractor and the Contractor is willing to provide these services and both parties wish to enter into this Agreement.

NOW, THEREFORE, it is agreed between the parties:

1. **SCOPE OF WORK**

The Contractor shall provide, without limitation, the following services.

[DESCRIPTION OF THE SERVICES REQUIRED FROM THE CONTRACTOR. SHOULD MIRROR THE DESCRIPTION OF THE SCOPE OF WORK IN THE SOLICITATION, THE CONTRACTOR'S PROPOSAL OR OFFER AND ANY PARTICULAR SERVICES AGREED TO BY THE COUNTYAND CONTRACTOR]

2. ADDITIONAL SERVICES

A. The parties agree that all tasks set forth in Section 1 (Scope of Work), of this Agreement shall be completed in full, to the satisfaction of the County, in accordance with professional standards and for the amount set forth in Section 3 (Compensation, Invoicing and Set-off), of this Agreement, and for no other cost, amount, fee or expense.

B. The County may from time to time request changes in the scope of work to be performed hereunder. Such changes, including any increase or decrease in the amount of the Contractor's compensation, which are mutually agreed upon by and between the County and the Contractor, shall be incorporated in a written amendment to this Agreement.

3. COMPENSATION, INVOICING AND SET-OFF

A. In consideration of its obligations under this Agreement the Contractor shall be compensated as follows:

1) County shall pay to the Contractor in full payment for services satisfactorily performed.

2) The total amount payable to the Contractor under this Agreement shall not exceed **[WRITTEN WORD]** dollars **($XX,XXX.XX) inclusive or exclusive** of New Mexico gross receipts tax.

3) This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this Agreement shall equal the amount stated herein. The parties do not intend for the Contractor to continue to provide services without compensation when the total compensation amount is reached. The County will notify the Contractor when the services provided under this Agreement reach the total compensation amount. In no event will the Contractor be paid for services provided in excess of the total compensation amount without this Agreement being amended in writing.

B. The Contractor shall submit a written request for payment to the County when payment is due under this Agreement. Upon the County's receipt of the written request, the County shall issue a written certification of complete or partial acceptance or rejection of the deliverables for which payment is sought.

1) The County's representative for certification of acceptance or rejection of contractual items and services shall be **[USER AGENCY NAME/INDIVIDUAL, ADDRESS AND PHONE NUMBER]**, or such other individual as may be designated in the absence of the County representative.

2) The Contractor acknowledges and agrees that the County may not make any payment hereunder unless and until it has issued a written certification accepting the contractual services or deliverables.

3) Within 30 days of the issuance of a written certification accepting the services or deliverables, the County shall tender payment for the accepted items or services. In the event the County fails to tender payment within thirty (30) days of the written certification accepting the items or services,

the County shall pay late payment charges of one and one-half percent (1.5%) per month, until the amount due is paid in full.

C. In the event the Contractor breaches this Agreement, the County may, without penalty, withhold any payments due the Contractor for the purpose of set-off until such time as the County determines the exact amount of damages it suffered as a result of the breach.

D. Payment under this Agreement shall not foreclose the right of the County to recover excessive or illegal payment.

4. EFFECTIVE DATE AND TERM

This Agreement shall, upon due execution by all parties, become effective as of the date of last signature by the parties and will terminate one year from such date, unless terminated earlier pursuant to Section 5 (Termination) or Section 6 (Appropriations and Authorizations). The County has the option to extend the term of this Agreement not to exceed four years in total.

5. TERMINATION

A. Termination of Agreement for Cause. Either party may terminate the Agreement based upon any material breach of this Agreement by the other party. The non-breaching party shall give the breaching party written notice of termination specifying the grounds for the termination. The termination shall be effective 30 days from the breaching party's receipt of the notice of termination, during which time the breaching party shall have the right to cure the breach. If, however, the breach cannot with due diligence be cured within 30 days, the breaching party shall have a reasonable time to cure the breach, provided that, within 30 days of its receipt of the written notice of termination, the breaching party began to cure the breach and advised the non-breaching party in writing that it intended to cure.

B. Termination for Convenience of the County. The County may, in its discretion, terminate this Agreement at any time for any reason by giving the Contractor written notice of termination. The notice shall specify the effective date of termination, which shall not be less than 15 days from the Contractor's receipt of the notice. The County shall pay the Contractor for acceptable work, determined in accordance with the specifications and standards set forth in this Agreement, performed before the effective date of termination but shall not be liable for any work performed after the effective date of termination.

6. APPROPRIATIONS AND AUTHORIZATIONS

This Agreement is contingent upon sufficient appropriations and authorizations being made for performance of this Agreement by the Board of County Commissioners of the County and/or, if state funds are involved, the Legislature of the State of New Mexico. If sufficient appropriations and authorizations are not made in this or future fiscal years, this Agreement shall terminate upon written notice by the County to the Contractor. Such termination shall be without penalty to the County, and the County shall have no duty to reimburse the Contractor for expenditures made in

the performance of this Agreement. The County is expressly not committed to expenditure of any funds until such time as they are programmed, budgeted, encumbered and approved for expenditure by the County. The County's decision as to whether sufficient appropriations and authorizations have been made for the fulfillment of this Agreement shall be final and not subject to challenge by the Contractor in any way or forum, including a lawsuit.

7. INDEPENDENT CONTRACTOR

The Contractor and its agents and employees are independent contractors and are not employees or agents of the County. Accordingly, the Contractor and its agents and employees shall not accrue leave, participate in retirement plans, insurance plans, or liability bonding, use County vehicles, or participate in any other benefits afforded to employees of the County. Except as may be expressly authorized elsewhere in this Agreement, the Contractor has no authority to bind, represent, or otherwise act on behalf of the County and agrees not to purport to do so.

8. ASSIGNMENT

The Contractor shall not assign or transfer any interest in this Agreement or assign any claims for money due or to become due under this Agreement without the advance written approval of the County. Any attempted assignment or transfer without the County's advance written approval shall be null and void and without any legal effect.

9. SUBCONTRACTING

The Contractor shall not subcontract or delegate any portion of the services to be performed under this Agreement without the advance written approval of the County. Any attempted subcontracting or delegating without the County's advance written approval shall be null and void and without any legal effect.

10. PERSONNEL

A. All work performed under this Agreement shall be performed by the Contractor or under its supervision.

B. The Contractor represents that it has, or will secure at its own expense, all personnel required to discharge its obligations under this Agreement. Such personnel (i) shall not be employees of or have any contractual relationships with the County and (ii) shall be fully qualified and licensed or otherwise authorized or permitted under federal, state, and local law to perform such work.

11. RELEASE

Upon its receipt of all payments due under this Agreement, the Contractor releases the County, its elected officials, officers, agents and employees from all liabilities, claims, and obligations. whatsoever arising from or under or relating to this Agreement.

12. CONFIDENTIALITY

Any confidential information provided to or developed by the Contractor in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization by the Contractor without the prior written approval of the County.

13. PUBLICATION, REPRODUCTION, AND USE OF MATERIAL; COPYRIGHT

A. The County has the unrestricted right to publish, disclose, distribute and otherwise use, in whole or in part, any reports, data, or other material prepared under or pursuant to this Agreement.

B. The Contractor acknowledges and agrees that any material produced in whole or in part under or pursuant to this Agreement is a work made for hire. Accordingly, to the extent that any such material is copyrightable in the United States or in any other country, the County shall own any such copyright.

14. CONFLICT OF INTEREST

The Contractor represents that it has no and shall not acquire any interest, direct or indirect, that would conflict in any manner or degree with the performance of its obligations under this Agreement.

15. NO ORAL MODIFICATIONS; WRITTEN AMENDMENTS REQUIRED

This Agreement may not be modified, altered, changed, or amended orally but, rather, only by an instrument in writing executed by the parties hereto. The Contractor specifically acknowledges and agrees that the County shall not be responsible for any changes to Section 1 (Scope of Work), of this Agreement unless such changes are set forth in a duly executed written amendment to this Agreement.

16. ENTIRE AGREEMENT; INTEGRATION

This Agreement incorporates all the agreements, covenants, and understandings between the parties hereto concerning the subject matter hereof, and all such agreements, covenants and understandings have been merged into this written Agreement. No prior or contemporaneous agreement, covenant or understandings, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

17. NOTICE OF PENALTIES

The State Procurement Code, NMSA 1978, Sections 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, New Mexico criminal statutes impose felony penalties for bribes, gratuities, and kickbacks.

18. EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE

A. The Contractor agrees to abide by all federal, state, and local laws, ordinances, and rules and regulations pertaining to equal employment opportunity and unlawful discrimination. Without in any way limiting the foregoing general obligation, the Contractor specifically agrees not to discriminate against any person with regard to employment with the Contractor or participation in any program or activity offered pursuant to this Agreement on the grounds of race, age, religion, color, national origin, ancestry, sex, physical or mental handicap, serious medical condition, spousal affiliation, sexual orientation, or gender identity.

B. The Contractor acknowledges and agrees that failure to comply with this Section shall constitute a material breach of this Agreement.

19. COMPLIANCE WITH APPLICABLE LAW; CHOICE OF LAW

A. In performing its obligations hereunder, the Contractor shall comply with all applicable laws, ordinances, and regulations.

B. Contractor shall comply with the requirements of Santa Fe County Ordinance 2014-1 (Establishing a Living Wage).

C. This Agreement shall be construed in accordance with the substantive laws of the State of New Mexico, without regard to its choice of law rules. Contractor and the County agree that the exclusive forum for any litigation between them arising out of or related to this Agreement shall be state district courts of New Mexico, located in Santa Fe County.

20. RECORDS AND INSPECTIONS

A. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to the County as part of the procurement process, the Contractor agrees to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under this Agreement; (ii) allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with generally accepted accounting principles (GAAP).

B. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to County as part of the procurement process, the Contractor also agrees to require any subcontractor it may hire to perform its obligations under this Agreement to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under the subcontract; (ii) to allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with GAAP.

21. INDEMNIFICATION

A. The Contractor shall defend, indemnify, and hold harmless the County and its elected officials, agents, and employees from any losses, liabilities, damages, demands, suits, causes of action, judgments, costs or expenses (including but not limited to court costs and attorneys' fees) resulting from or directly or indirectly arising out of the Contractor's performance or non-performance of its obligations under this Agreement, including but not limited to the Contractor's breach of any representation or warranty made herein.

B. The Contractor agrees that the County shall have the right to control and participate in the defense of any such demand, suit, or cause of action concerning matters that relate to the County and that such suit will not be settled without the County's consent, such consent not to be unreasonably withheld. If a conflict exists between the interests of the County and the Contractor in such demand, suit, or cause of action, the County may retain its own counsel to represent the County's interests.

C. The Contractor's obligations under this section shall not be limited by the provisions of any insurance policy the Contractor is required to maintain under this Agreement.

22. SEVERABILITY

If any term or condition of this Agreement shall be held invalid or non-enforceable by any court of competent jurisdiction, the remainder of this Agreement shall not be affected and shall be valid and enforceable to the fullest extent of the law.

23. NOTICES

Any notice required to be given to either party by this Agreement shall be in writing and shall be delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, as follows:

To the County: Santa Fe County
Attn: Santa Fe County Manager
102 Grant Avenue
P.O. Box 276
Santa Fe, New Mexico 87504-0276

To the Contractor: **[CONTRACTOR'S NAME AND ADDRESS]**

24. CONTRACTOR'S REPRESENTATIONS AND WARRANTIES

The Contractor hereby represents and warrants that:

A. This Agreement has been duly authorized by the Contractor, the person executing this Agreement has authority to do so, and once executed by the Contractor, this Agreement shall constitute a binding obligation of the Contractor.

B. This Agreement and Contractor's obligations hereunder do not conflict with Contractor's corporate agreement, or any statement filed with the New Mexico Secretary of State on Contractor's behalf.

C. Contractor is legally registered and is properly licensed by the State of New Mexico to provide the services anticipated by this Agreement and shall maintain such registration and licensure in good standing throughout the duration of the Agreement.

25. FACSIMILE or ELECTRONIC SIGNATURES

The parties hereto agree that a facsimile or electronic signature has the same force and effect as an original for all purposes.

26. NO THIRD-PARTY BENEFICIARIES

This Agreement was not intended to and does not create any rights in any persons not a party hereto.

27. INSURANCE

A. General Conditions. The Contractor shall submit evidence of insurance as is required herein. Policies of insurance shall be written by companies authorized to write such insurance in New Mexico.

B. General Liability Insurance, Including Automobile. The Contractor shall procure and maintain during the life of this Agreement a comprehensive general liability and automobile insurance policy with liability limits in amounts not less than $1,000,000.00 combined single limits of liability for bodily injury, including death, and property damage for any one occurrence. Said policies of insurance shall include coverage for all operations performed for the County by the Contractor; coverage for the use of all owned, non-owned, hired automobiles, vehicles and other equipment, both on and off work; and contractual liability coverage under which this Agreement is an insured contract. Santa Fe County shall be a named additional insured on the policy.

C. Increased Limits. If, during the life of this Agreement, the Legislature of the State of New Mexico increases the maximum limits of liability under the Tort Claims Act (NMSA 1978, Sections 41-4-1 through 41-4-29, as amended), the Contractor shall increase the maximum limits of any insurance required herein.

28. PERMITS, FEES, AND LICENSES

Contractor shall procure all permits and licenses, pay all charges, fees, and royalties, and give all notices necessary and incidental to the due and lawful performance of its obligations hereunder.

29. NEW MEXICO TORT CLAIMS ACT

No provision of this Agreement modifies or waives any sovereign immunity or limitation of liability enjoyed by County or its "public employees" at common law or under the New Mexico Tort Claims Act, NMSA 1978, Section 41-4-1, et seq.

30. CAMPAIGN CONTRIBUTION DISCLOSURE FORM

The Contractor agrees to compute and submit simultaneous with execution of this Agreement a Campaign Contribution Disclosure form approved by the County.

31. APPOINTMENT OF AGENT FOR SERVICE OF PROCESS

The Contractor hereby irrevocably appoints **[NAME AND ADDRESS OF AGENT]**, as its agent upon whom process and writs in any action or proceeding arising out of or related to this Agreement may be served. The Contractor acknowledges and agrees that service upon its designated agent shall have the same effect as though the Contractor were actually and personally served within the state of New Mexico.

32. SURVIVAL

The provisions of following paragraphs shall survive termination of this Contract; INDEMNIFICATION; RECORDS AND INSPECTION; RELEASE, CONFIDENTIALITY, PUBLICATION, REPRODUCTION, AND USE OF MATERIAL; COPYRIGHT; COMPLIANCE WITH APPLICABLE LAW; CHOICE OF LAW; NO THIRD-PARTY BENEFICIARIES; SURVIVAL.

IN WITNESS WHEREOF, the parties have duly executed this Agreement as of the date first written above.

SANTA FE COUNTY

_____
, Board Chair
Santa Fe County Board of County Commissioners

ATTESTATION:

_____ _____
Katharine E. Clark Date
Santa Fe County Clerk

Approved as to form.

_____ _____
Walker Boyd Date
Santa Fe County Attorney

CONTRACTOR:

_____ _____
(Signature) Date

_____
(Print Name)

_____
(Print Title)

APPENDIX H

Systems Requirements

System Requirements

Please download the Microsoft Excel version of the Requirements Traceability Matrix (RTM) for the Jail Management System (JMS) using the attachment provided with this RFP. The RTM outlines the functional, technical, and security requirements established by Santa Fe County for the replacement of its current JMS platform.

Each Offeror is required to complete the RTM in its original Excel format by responding to every listed requirement based on their proposed JMS solution's capabilities. Detailed instructions and response guidelines are included within the spreadsheet and must be followed accordingly.

Offerors must include the completed RTM as part of their electronic proposal submission via USB drive. The County will use these responses to evaluate how well each proposed solution meets the facility's operational and technical needs. Submissions that do not include a completed RTM in the required format and delivery method will be disqualified from further consideration in the RFP evaluation process.

Please refer to the RTM attachment and ensure that all instructions within the document are followed to submit a complete and compliant response.

JMS System:

Complete only the functional areas listed below of the JMS RTM contained in the JMS RTM folder using the link above:

- General
- Integration
- Reporting
- Administration
- Booking
- Investigations
- Programs
- Security

APPENDIX I

Optimized Future State (To-Be)

Optimized Future State [1.1]

The purpose of Appendix I – Optimized Future State is to detail the County's future vision for utilization of the various modules which comprise the integrated suite of jail management solutions requested in the RFP.

Optimized Future State Administration Department [1.2]

The future-state JMS will transform administrative operations by consolidating reporting, compliance tracking, and investigative documentation into a centralized, digital, and role-secured platform. Administrative staff will no longer rely on fragmented systems or manual coordination. Instead, real-time dashboards, automated workflows, and integrated records management will support traceable, policy-compliant jail operations.

Operational Reporting & Compliance

The JMS will offer user-customizable dashboards for administrative staff to view and generate reports based on role, department, or compliance requirements. Reports such as classification summaries, disciplinary logs, RHU rosters, and daily admissions/releases will be generated automatically and scheduled for distribution to internal leadership and external agencies. System filters will allow drilldowns by housing unit, sanction type, PREA status, or case resolution. Preconfigured report templates will align with the needs of the County.

Audit Preparation & Oversight

The system will consolidate audit readiness with a searchable repository of historical reports, compliance logs, and inspection data. Administrators will access digital folders tied to audit categories (e.g., RHU housing durations, classification backlogs, sanitation logs), each with timestamps, approval history, and data lineage tracking. The JMS will also provide pre-audit dashboards highlighting expired items, incomplete documentation, or missing supervisory signoffs, reducing manual audit prep and enabling faster response to unannounced inspections.

Investigative & Legal Documentation

The JMS will centralize access to historical records used for internal investigations, litigation response, and IPRA/public records requests. Authorized users will be able to retrieve linked incident reports, inmate movement histories, classification changes, and digital attachments (e.g., photos, bodycam video, signed forms) from a single interface. A built-in investigation tracking module will log case creation, status changes, task ownership, and audit trails for all evidence entered or accessed.

Reporting System Oversight

Administrative users will manage report configuration across the JMS, including setting permissions, updating template libraries, and monitoring department usage. The system will replace the current fragmented template structure with categorized, searchable, and deduplicated report inventories. User roles will define access privileges, ensuring that department-specific reports (e.g., classification, compliance, legal) are visible and customizable without clutter from unused templates.

Compliance Task Tracking

All safety, sanitation, environmental, and fire compliance activities will be logged directly within JMS using structured digital forms. Completion dates, assigned staff, inspection results, and deficiencies will be tracked with due-date alerts, task reminders, and escalation notifications. Dashboards will summarize inspection status across time intervals and facility zones. Reports can be exported for NMAC compliance or internal review and automatically attached to audit folders.

AI-Powered Administrative Features

The County welcomes Offeror input and innovation in the area of artificial intelligence to enhance administrative efficiency, investigative workflows, and compliance monitoring. The County is particularly interested in AI capabilities that support contextual or natural language search for investigative and compliance records; facial and tattoo recognition tools for identity verification; predictive analytics for detecting audit gaps or missing RHU documentation; and automated recommendations for report cleanup, template consolidation, or inspection scheduling. Offerors are encouraged to describe how their AI offerings can proactively assist staff in decision-making, reduce manual review, and support data integrity within the administrative functions of the JMS.

Optimized Future State -Booking Department [1.3]

The future-state JMS will fully digitize the intake and release lifecycle, replacing paper-based workflows with a guided, automated platform that improves speed, accuracy, and compliance. Booking clerks will perform all data entry within a unified digital interface that integrates medical, financial, property, and legal components into one seamless workflow. The system will enforce workflow steps, provide real-time alerts for missing data, and maintain an automated audit trail for all intake and release activities.

Digital Intake & Unified Workflow

Booking will be conducted through digital intake forms completed on tablets or booking kiosks. Arrest documentation, identifiers, property logs, and financial data

will be entered directly into JMS at the point of contact, eliminating handwritten forms and manual transcription. A unified intake screen will combine demographic, medical, financial, and property data in a single view, preventing fragmented data entry across multiple modules. The system will enforce completion of mandatory fields and provide real-time alerts if required actions, such as medical clearance, are not fulfilled before advancing in the workflow.

Identity Resolution & Profile Integrity

Booking will be conducted through digital intake forms completed on tablets or booking kiosks. Intake officers will use tablets at the point of arrest to capture all required intake information—replacing the current reliance on handwritten forms and paper packets. Arrest documentation, identifiers, property logs, and financial data will be entered directly into JMS, eliminating manual transcription and reducing error rates. A unified intake screen will combine demographic, medical, financial, and property data in a single view, preventing fragmented data entry across multiple modules. The system will enforce completion of mandatory fields and provide real-time alerts if required actions, such as medical clearance, are not fulfilled before advancing in the workflow.

Medical, Financial, and Property Integration

The JMS will be fully integrated with external systems such as Keefe and Sapphire to ensure real-time syncing of clearance status, account balances, and property intake. Financial deposits entered during intake will be immediately linked to the inmate's profile. If an inmate is medically rejected or the intake is voided, the JMS will automatically cancel financial transactions in Keefe and generate a refund pathway—eliminating manual workarounds. Property entries will be logged digitally and stored with intake records, with cross-verification between systems.

Court Documentation Processing

All court orders, warrants, release instructions, and bond documents will be scanned or uploaded directly into JMS and permanently linked to the inmate's profile. The system will validate case numbers against the Odyssey court system or approved court data source, alerting staff to mismatches or missing paperwork. JMS will support workflow routing of court documentation to appropriate parties and enable real-time visibility into which cases or release conditions are pending, active, or resolved.

Sentence Tracking & Maintenance

The JMS will support automated sentence calculation based on booking data, time served, custody level, and applicable credits (e.g., good time, work time). As sentencing updates are received, the system will adjust projected release dates accordingly and flag records requiring re-evaluation. All sentence modifications, holds, or override requests will be fully logged with reason codes, timestamps, and

approval tracking. A dashboard view will provide real-time insight into inmates nearing release eligibility and alert staff to discrepancies in sentencing records.

Automated Release Processing

Release workflows will be fully digitized, capturing signoffs and verification steps using tablets. JMS will automatically calculate release eligibility based on sentence status, holds, and court orders. All documentation will be digitally stored and tied to the inmate record, replacing hard copy packets and enabling rapid retrieval for audits or legal review. Release will be blocked if NCIC results, medical clearance, or detainer information are incomplete, and system alerts will direct staff to resolve outstanding items prior to approval.

Interagency & Court Integration

The JMS will integrate with the Santa Fe County Sheriff's Office and outside jurisdictions to coordinate releases, transfers, and court dates. Messaging, transport scheduling, and document sharing will be conducted through the JMS interface, eliminating reliance on fax, email, or verbal communications. System-generated notices will inform external agencies of custody status changes and pending release actions in real time.

Real-Time Validation & Audit Readiness

All intake and release entries will be validated at the time of entry, with alerts for missing or conflicting information. Staff will be prompted to resolve issues before the action can be completed. All entries, edits, and corrections will be logged with audit trails capturing the user, timestamp, original value, and revised value. Booking and releasing dashboards will summarize all activity by date range and display status indicators (e.g., pending medical, missing case number, incomplete documents) for real-time quality control.

AI-Powered Booking Features

The County welcomes Offeror innovation in the use of artificial intelligence to enhance booking operations. Desired AI features include facial recognition tools for accurate inmate identification, intelligent profile matching to prevent duplicate records, and predictive analytics to forecast intake processing delays based on volume or missing documentation. Offerors are encouraged to detail how their AI tools support booking efficiency, release accuracy, and data integrity at every stage of the intake lifecycle, and identify which AI platforms Offeror would intend to use.

Optimized Future State - Classification Department [1.4]

The future-state JMS will transform inmate classification by enabling automated, judgment-informed decision-making, while ensuring housing safety, data integrity, and interdepartmental coordination. Classification assessments, overrides, alerts,

and updates will be conducted entirely within the JMS, eliminating reliance on spreadsheets, emails, or paper forms. The system will support transparent, audit-ready workflows and integrate real-time risk indicators to support accurate custody placement.

Automated Classification & Decision Support

The JMS will utilize a structured, decision-tree-based classification model that dynamically guides staff through scoring logic, ensuring consistency while allowing for judgment-based inputs where applicable. The system will capture factors such as criminal history, gang affiliation, behavioral history, PREA risk, and co-defendant status. Classification results will determine initial custody level and housing eligibility, while also triggering alerts when higher-risk scenarios such as RHU placement or overrides are detected.

Risk Flagging & Housing Safety

Known enemies, co-defendants, and incompatible housing combinations will be flagged in real time during classification. The JMS will automatically cross-reference inmate relationships, prior incidents, and PREA designations, and will block or warn against unsafe housing assignments. PREA-related flags will be visible within the inmate profile to all authorized classification, housing, and security staff, supporting informed placement and risk mitigation.

Override Processing & Approval Routing

Classification overrides will be fully supported within JMS, with built-in justification fields, reason codes, and digital signature routing. Authorized personnel will receive automated notifications when an override request is submitted, and approval workflows will be logged in the system with timestamps and staff identifiers. The elimination of paper-based override forms will increase accountability, reduce delays, and simplify audit preparation.

Housing Alerts & Classification Updates

When an inmate's classification changes whether due to disciplinary sanctions, new charges, or scheduled reassessments the JMS will prompt a housing alert, signaling that the current housing assignment must be reevaluated. Staff will be notified in real time, and the system will support the reassignment of inmates based on updated custody levels or override status. Housing recommendations will be system-generated but editable based on supervisor review.

Optimized Future State - Investigations Department [1.5]

The future-state JMS will centralize the investigation and disciplinary process into a transparent, fully digital platform. From initial complaint entry to case resolution, all investigative documentation will be standardized, timestamped, and auditable. The JMS will consolidate informal complaints, formal grievances, misconduct

reports, and hearing documentation into a unified system that improves tracking, staff accountability, and response coordination across all investigative workflows.

Informal Complaints & Grievance Management

All informal complaints and formal grievances will be tied directly to inmate profiles and logged through a centralized dashboard. Complaints may be submitted through various channels including kiosk, tablet, or staff entry, with each method feeding into a unified queue for processing and escalation. Each entry will be timestamped and assigned a unique case number, enabling full traceability from submission to resolution. Status updates, escalations, and resolution notifications will be system-managed and visible to authorized staff in real time. The dashboard will display pending, resolved, and overdue grievances, and will support compliance tracking and performance analytics.

Digital Misconduct Reports & Hearing Preparation

Misconduct reports will be entered and stored digitally within JMS, each tied to a specific inmate record and supported by a guided narrative template. Reports will allow attachments such as images, scanned documents, and surveillance or bodycam video to be stored alongside written statements. Role-based permissions will ensure that disciplinary staff, including the case workers, can access only the records appropriate to their authority. All reports will include timestamped entries, charge classifications, and editable sanction fields. Templates will support both standard infractions and ad-hoc or case-specific misconducts, allowing flexibility without compromising structure.

Disciplinary Review & Approval Workflow

The JMS will route new misconduct reports automatically to the appropriate reviewers. Upon submission, system-generated alerts will notify the case worker of new cases. Reports requiring approval from the Chief of Security or designee will be flagged and routed through electronic approval chains. Any filed appeals will trigger alerts to the Deputy Warden and initiate an escalation review process. All approvals, denials, and appeal decisions will be recorded in the case history, complete with timestamps, authorizations, and comments, forming a comprehensive digital case file for each incident.

Role-Based Access & Reporting

The JMS will enforce secure, role-based access to investigative data. Staff assigned to internal investigations, grievance review, or disciplinary hearings will be able to view, update, or close cases based on their role. Case notes, attached evidence, and decision logs will be stored in a tamper-evident format, ensuring integrity across all investigative processes. The disciplinary module will include built-in reporting functionality that generates the Disciplinary Log, capturing fields such as inmate name, detention number (D#), offense type, charge details, sanctions applied, and

hearing outcome. Data will be filterable by individual, housing unit, charge category, or timeframe to support internal auditing and trend analysis.

Optimized Future State - Programs Department [1.6]

The future-state JMS will fully digitize program tracking and inmate work assignments, ensuring eligibility, participation, and compensation are centrally managed with real-time oversight. Porter (trustee) assignments, SMU committee hearings, and program progress will be accessible through a role-secured interface, supporting proactive management, accountability, and integration with behavior, disciplinary, and financial systems.

Porter Assignment & Participation Tracking

Porter assignments, eligibility criteria, and work history will be managed directly within JMS. A centralized dashboard will allow program staff and supervisors to view available positions, assign eligible inmates, track shifts, task completion, and status changes. Staff will be able to view porter histories by inmate, including prior assignments, reassignment reasons, and performance notes. Eligibility will be system-enforced based on behavioral flags, sentencing status, disciplinary history, and medical clearance. JMS will generate alerts when conditions change that affect eligibility or assignment, including infractions or changes to custody status.

Tablet-Based Timekeeping & Payroll Integration

Time tracking for porters will be conducted via tablets used by staff or the inmate kiosk system. Log-ins, shift starts, and hours worked will be captured electronically and stored in JMS for audit and reconciliation. The system will integrate directly with Keefe or other inmate accounting systems to automate payroll calculations and apply deductions based on logged work hours. This will eliminate manual reconciliation and ensure real-time accuracy of inmate earnings, performance-based incentives, and deductions.

Behavior-Linked Eligibility Monitoring

JMS will monitor disciplinary records, PREA flags, and housing status to determine porter eligibility in real time. Inmates flagged for recent infractions, medical concerns, or administrative segregation will be automatically restricted from porter assignments. If behavior issues arise after assignment, JMS will trigger alerts to program staff with recommendations for reassignment or removal. Notes, overrides, and decisions related to porter status will be digitally logged with timestamps and reasons.

Committee Hearings & Meeting Management

The system will provide a centralized interface for SMU committee hearings, case reviews, and program-related meetings. Meeting agendas, case discussions, and outcome notes will be recorded within JMS and directly tied to the inmate’s

profile. Staff will have the ability to document decisions, assign follow-up tasks, and monitor completion status. JMS will track meeting participation and resolution timelines, providing a historical record of program engagement.

Task Assignment, Alerts & Follow-Up

Tasks assigned during committee or program meetings such as behavioral goals, reclassification review, or educational programming will be managed as part of the inmate's digital record. JMS will trigger automated alerts and reminders for follow-ups, overdue items, or incomplete assignments. Completed actions will be timestamped, and all entries will be auditable to support accountability, continuity of care, and compliance reporting.

Documentation & Profile Integration

All program participation records, performance evaluations, meeting outcomes, and committee decisions will be stored within the inmate's JMS profile. This will allow classification, security, and administrative staff to view relevant engagement history and behavioral notes without requesting external files or reports. The system will support exportable summaries for review boards, audits, or reentry planning, while role-based permissions will control access to sensitive records.

Optimized Future State – Security Department [1.7]

The future-state JMS will provide security staff with a fully digital, integrated environment to manage inmate movement, document incidents, and enforce discipline with consistency and accountability. Manual processes such as paper-based reporting, one-by-one movement tracking, and email-based approvals will be replaced by streamlined, role-based workflows that support real-time coordination, transparency, and audit-ready documentation.

Inmate Movement & Real-Time Tracking

The JMS will allow staff to record multiple inmate transfers simultaneously through a centralized movement interface, supporting batch processing of housing changes, court transports, and medical appointments. Movement logs will be updated dynamically, enabling real-time visibility into inmate location and status across all units and checkpoints. The system will eliminate redundant entries by syncing transport data across connected systems and supporting one-time entry workflows.

Automated Approvals & Integration with Guardian

All inmate movement requests will be routed through digital approval workflows embedded in JMS. Notifications will alert supervisors and command staff of pending approvals, with full traceability, timestamps, and authorization tracking built into the record. JMS will integrate directly with Guardian to sync headcounts, unit checks, and out-counts, eliminating duplicate entry and enabling seamless

location updates. Movement to court, medical, or external agency appointments will trigger system-generated alerts for coordination and accountability.

Scheduled Events & Out-Count Management

JMS will include a calendar-based scheduling module to support court dates, medical assessments, and other out-count activities. System-generated alerts will notify staff of upcoming events, required movement preparations, and inmate readiness status. Out-counts will be tracked through the movement module and reflected in the inmate's profile, providing clear visibility to all authorized users.

Incident Reporting & Misconduct Management

Incident reports will be fully digitized within JMS. Officers will enter narratives directly into the system and attach supporting documentation such as photos, scanned forms, and video clips from body cameras or security cameras. Integrations with Axon and Avigilon will allow footage to be uploaded or linked directly to the report. Each report will follow a structured format, with built-in workflows for supervisor approval, evidence review, and routing to disciplinary staff. Timestamped records and digital signatures will ensure secure and auditable case handling.

Digital Disciplinary Tracking & Case Resolution

Disciplinary actions will be logged within JMS using a dedicated misconduct module that tracks case status, sanction details, and resolution history. Repeat offenses and pending sanctions will be visible in each inmate's profile, informing housing, classification, and work assignment decisions. JMS will include a misconduct dashboard that provides at-a-glance visibility of recent infractions, unresolved cases, and appeal status by housing unit, inmate, or incident type.

Alerts, Notifications & Workflow Automation

The JMS will generate automated alerts for pending misconduct reviews, hearing scheduling, overdue appeals, and report approvals. Escalation paths will ensure that unresolved incidents are flagged for administrative follow-up. Case tracking will span the full lifecycle from incident entry to hearing outcome and resolution, with all relevant documentation stored in a unified case file accessible to authorized staff.

Integration with Security Technology & Evidence Handling

The future system will close existing gaps by enabling direct integration with video evidence systems such as Axon (body cameras) and Avigilon (facility cameras). Staff will no longer need to manually retrieve and upload files. Instead, attachments will be linked within JMS, and access to view or export will be managed through role-based permissions. All digital evidence will be stored with

the corresponding incident report and included in workflow routing for approval and investigative follow-up.