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| RC2 |  | REQUEST FOR PROPOSAL |
|  |  | |  | | --- | | **JUDICIAL COUNCIL OF CALIFORNIA**  **Title:**  **cALENDAR sCHEDULING sYSTEM**  **RFO Number: admin-2018-04-LB**  **PROPOSALS DUE:**  April 6, 2018  NO LATER THAN 2:00 P.M. (PACIFIC TIME) | |
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**1.0 BACKGROUND INFORMATION**

1.1 The Judicial Council of California (JCC), chaired by the Chief Justice of California, is the chief policy making agency of the California judicial branch. The California Constitution directs the JCC to improve the administration of justice by surveying judicial business, recommending improvements to the courts, and making recommendations annually to the Governor and the Legislature. The JCC also adopts rules for court administration, practice, and procedure, and performs other functions prescribed by law.

1.2 As an internal services organization within the JCC, the Conference Center & Reception Services Unit (located within the office of Conference & Print Production) is tasked with coordinating the operation of on-site conferences and events held in dedicated conference centers in San Francisco and Sacramento. Within the two (2) conference centers there are thirty (30) unique rooms covering 20,000 square feet, which accommodate approximately 1,800 meetings annually.

**2.0 DESCRIPTION OF GOODS AND/OR SERVICES**

**2.1 Purpose:** The JCC seeks to identify and retain a qualified entity with expertise in providing a cloud-based, (web portal) conference and room calendar scheduling system. This RFP details the requirements of a sufficient conference calendar scheduling system and is the means for proposers to submit their qualifications and request selection as a Contractor for these services.

**2,2 Definition of Users**

1. Administrators manage and maintain the following application components:
   * + - “Look and feel” screens, including tabs, input fields, and labels
       - Selection fields by role
       - Pick lists / drop-down forms and menus (e.g. for locations, rooms, equipment resources)
       - Configuration of notification generation
       - Security role and permission management
2. Approvers are staff who review, approve, and select meeting facilities and resources.
3. Requestors are users interested in scheduling a conference room and/or related resources. Requestors will be largely internal staff.
4. Service Providers provide audio/visual (A/V) equipment set up and support; Information Services (IS) set up and support and catering services.

**2.3 Functional Requirements**

TABLE 1: “M” Must Have; “D” Desirable

|  |  |  |  |
| --- | --- | --- | --- |
|  | **(M)/(D)** | **Able to Provide**  **Yes or No** | **Explanation** |
| ***Requestor Functionality*** |  |  |  |
| System shall provide all parties (Requestors and Approvers) with the ability to view all rooms and resources by day, week and month (e.g., instantly to see the current room reservations and availability, by day, in a calendar grid). | **M** |  |  |
| System shall allow Requestors to select location of interest (e.g. San Francisco or Sacramento office). | **M** |  |  |
| All locations shall have a unique resource and/or room assignments and options. | **M** |  |  |
| System shall have an intuitive and easy-to-use room and resources request fillable form based process for Requestors. | **M** |  |  |
| The system’s form shall provide Requestors with the ability to request meeting room and associated resources. Requestors shall have ability to specify: | **M** |  |  |
| Room diagram and applicable capacity settings (e.g., classroom, round-table, or union formats). | **M** |  |  |
| Equipment resources (e.g. audio/visual requirements). | **M** |  |  |
| System shall allow Requestors the ability to request (and denote as such) secondary breakout rooms with all of the associated resources listed above. | **D** |  |  |
| System shall provide Requestors with the ability to request recurring and repeat meetings. | **M** |  |  |
| System shall provide Requestors with the ability to search available dates given a set of criteria (e.g. room capacity) or by meeting name and/or contact info. | **D** |  |  |
| System shall allow both Approvers and Requestors the ability to upload or attach documents (e.g. Word, PDF) to a specific meeting entry | **D** |  |  |
| ***Approver Functionality*** |  |  |  |
| System shall queue Requestors pending submissions so that the Approver may pair a request with a resource (e.g. a meeting room) and then approve and post or deny the request. | **M** |  |  |
| System shall track all entries and all changes to the request by Approver. | **M** |  |  |
| ***Administrator Functionality*** |  |  |  |
| System shall provide Administrators with the ability to add/delete meeting rooms. | **M** |  |  |
| System shall provide Administrators with the ability to add/delete equipment resources. | **M** |  |  |
| System shall provide Administrators ability to upload visual displays (graphics, photography) of room and resources. | **D** |  |  |
| System shall provide Administrators ability to add, delete and delegate users’ access level. | **M** |  |  |
| System shall allow Administrators an integrated electronic back-end multi-layered approval system for various functions (e.g. tentative approval pending further info). | **D** |  |  |
| ***Service Providers - Equipment (A/V) Management*** |  |  |  |
| System shall provide the Requestor the ability to select the following A/V equipment, including but not limited to::   * + - * Flipcharts       * Laptop or computer       * Computer projector       * PowerPoint presentation       * TV and DVD equipment       * Audio or video recording (services)       * Telephonic conference (call line) and speakerphone       * Video conference       * Web conference       * Associated equipment: Extension cords, power strips | **M** |  |  |
| Upon the Approver’s confirmation and/or the Requestor’s selection of A/V equipment, the system shall trigger an equipment management workflow. | **D** |  |  |
| ***Catering Management*** |  |  |  |
| System shall provide Requestors with unique catering choices (e.g. a catering menu), based on location of request (e.g. Sacramento office). | **D** |  |  |
| System shall provide Requestors with the ability to order catering in conjunction with or without the room reservation process. | **D** |  |  |
| System shall provide Administrators with the ability to implement an approval and confirmation workflow for orders. | **D** |  |  |
| System shall provide Administrators with the ability to manage orders throughout the fulfillment process from a single website. | **D** |  |  |
| ***Notifications*** |  |  |  |
| System shall have the ability to automatically generate and send Service Providers notifications of services requested. | **D** |  |  |
| System shall have the ability to automatically generate and send Requestors meeting confirmations and future reminders. | **D** |  |  |
| System shall have the ability to send confirmation notifications from Service Providers to Requestors | **D** |  |  |
| ***Workflow Management*** |  |  |  |
| System shall have the ability to require room, equipment and catering requests be routed (to an Approver or Administrator) for approval, prior to being booked. | **M** |  |  |
| System shall not visually display a room is “booked” until/unless a request has been approved and confirmed. | **M** |  |  |
| ***Administration & Security*** |  |  |  |
| System shall provide a single website. | **M** |  |  |
| System shall have the ability to set user privileges by group, such as department or location. | **M** |  |  |
| System shall have the ability to create varying access levels and views by role. | **M** |  |  |
| System shall allow separate unique interfaces (e.g. for each regional office or user group) | **M** |  |  |
| Room requestors shall be able to select a location, but not reserve a specific room. | **M** |  |  |
| System shall provide the ability to set administrative access and roles per location (e.g., setting a different administrator for each regional office). | **D** |  |  |
| ***Reporting Functionality*** |  |  |  |
| System shall provide Approvers the ability to build custom reports of event data including charts and/or graphs. | **D** |  |  |
| System shall provide Approvers the ability to filter reports based on the following fields, separately or together: | **M** |  |  |
| Room, location | **M** |  |  |
| Meeting type, audience, division, requestor | **M** |  |  |
| Catering detail | **D** |  |  |
| Audio/visual or other equipment | **D** |  |  |
| System shall have built or provide ability to build the following reports: |  |  |  |
| Room utilization filtered and/or sorted by room. | **D** |  |  |
| ***Additional Functionality*** |  |  |  |
| System shall have the ability to export the data in a format that can be easily integrated into other applications (e.g. export a mirror image of the calendar to another website or intranet). | **D** |  |  |
| System shall provide ability to filter/display calendar information according to audience (public view, intranet view, etc). | **D** |  |  |
| The ability to migrate current and/or historical data into new system. | **D** |  |  |

**2.4 Technical Specifications**

Table 2:

|  |  |  |  |
| --- | --- | --- | --- |
| Must be able to support all major common browsers (e.g. 11/Edge, Chrome, FireFox, and Safari). | **M** |  |  |
| Highly responsive customer/technical support, including a formal performance based service level agreement that defines standards for service delivery. Customer services hours should extend past normal business hours. | **M** |  |  |
| Solution maintenance and version management. Please describe your version management and solution maintenance processes. | **M** |  |  |
| Notification shall be provided of minor or major system downtime. | **M** |  |  |
| Solution has on-line training and support materials available to users, developers and administrators. | **D** |  |  |
| ADA compliant | **M** |  |  |
| Must be able to store historical data for a minimum of five (5) years. | **D** |  |  |

**2.5 Additional Features/Functionality**

Table 3:

Bidder may list additional features and/or functionality your organization can provide which may further improve the Calendar Scheduling System that are not listed in the above tables. You may add additional lines to the table as needed.

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**3.0 TIMELINE FOR THIS RFP**

The JBE has developed the following list of key events related to this RFP. All dates are subject to change at the discretion of the JBE.

| **EVENT** | **DATE** |
| --- | --- |
| RFP issued**:** | March 14, 2018 |
| Deadline for questions by 2:00 p.m. (PT). Submit to mail box solicitations@jud.ca.gov | March 21, 2018 |
| Questions and answers posted  *(estimate only)* | March 27, 2018 |
| **Latest date and time proposal may be submitted by 2:00 p.m. (PT)** | **April 6, 2018** |
| Anticipated Product Demonstration dates, (if required) (*estimate only*) | April 16, 2018 |
| Evaluation of Technical proposals (*estimate only*) | April 23-April 27, 2018 |
| Technical proposals scores posted at *www.courts.ca.gov/rfps.htm (estimate only)* | May 3, 2018 |
| Public opening of cost portion of proposals  Notice of time and location will be posted at [*www.courts.ca.gov/rfps.htm*](http://www.courts.ca.gov/rfps.htm) *(estimate only)* | May 7, 2018 |
| Notice of Intent to Award (*estimate only*) | May 10, 2018 |
| Negotiations and execution of contract  (*estimate only*) | May 17, 2018 |
| Contract start date (*estimate only*) | June 1, 2018 |
| Contract end date (*estimate only*) | May 31, 2028 |

**4.0 RFP ATTACHMENTS**

The following attachments are included as part of this RFP:

| **ATTACHMENT** | **DESCRIPTION** |
| --- | --- |
| Attachment 1: Administrative Rules Governing RFPs (IT Goods and Services): | These rules govern this solicitation. |
| Attachment 2: JBE Purchase Order Terms and Conditions | If selected, the person or entity submitting a proposal (the “Proposer”) must sign a JBE Standard Form agreement containing these terms and conditions (the “Terms and Conditions”). |
| Attachment 3: Proposer’s Acceptance of Terms and Conditions | On this form, the Proposer must indicate acceptance of the Terms and Conditions or identify exceptions to the Terms and Conditions. |
| Attachment 4: General Certifications Form | The Proposer must complete the General Certifications Form and submit the completed form with its proposal. |
| Attachment 5: Small Business Declaration | Complete and return this form only if it wishes to claim the small business preference associated with this solicitation. |
| Attachment 6: Payee Data Record Form | This form contains information the JBE requires in order to process payments and must be submitted with the proposal. |
| Attachment 7: Reference Form | The Proposer must complete and return this form with its proposal |

**5.0 PAYMENT INFORMATION**

Payment will be based per the terms in Attachment 2, Purchase Order Terms and Conditions.

**6.0 SERVICE TERM**

The services specified in this RFP are expected to be performed by the selected Proposer for an initial three (3) year period commencing on or about June, 1, 2018 (actual date is TBD), and ending May 31, 2021, with additional annual service renewals in one (1) year increments for a maximum of seven (7) option terms. Service renewals will be at the sole discretion of the Judicial Council and will be exercised upon satisfactory performance during the preceding term.

**7.0 SUBMISSIONS OF PROPOSALS**

7.1 Proposals should provide straightforward, concise information that satisfies the requirements of the “Proposal Contents” section below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the RFP’s instructions and requirements, and completeness and clarity of content.

7.2 The Proposer must submit its proposal in two parts, the non-cost portion and the cost portion.

a. The Proposer must submit **one (1) original** of the non-cost portion of the proposal. The original must be signed by an authorized representative of the Proposer. The original non-cost portion of the proposal must be submitted to the JBE in a single sealed envelope, separate from the cost portion. The Proposer must write the RFP title and number on the outside of the sealed envelope.

b. The Proposer must submit **one (1) original** of the cost portion of the proposal. The original must be signed by an authorized representative of the Proposer. The original cost portion of the proposal (and the copies thereof) must be submitted to the JBE in a single sealed envelope, separate from the non-cost portion. The Proposer must write the RFP title and number on the outside of the sealed envelope.

c. The Proposer must submit an electronic version of the entire proposal on CD-ROM or USB memory stick/flash drive. It is recommended that you have separate files for the non-cost and cost portions in the electronic version. The files must be in PDF, Word, or Excel formats.

7.3 Proposals must be delivered by the date and time listed on the coversheet of this RFP to:

Judicial Council of California

Branch Accounting and Procurement | Administrative Division

Attn: Lenore Fraga-Roberts, RFP: ADMIN-2018-04-LB

455 Golden Gate Avenue, 6th Floor

San Francisco, CA 94102-3688

7.4 Late proposals will not be accepted.

7.5 Only written proposals will be accepted. Proposals must be sent by registered or certified mail, courier service (e.g. FedEx), or delivered by hand. Proposals may not be transmitted by fax or sent via email.

**8.0 PROPOSAL CONTENTS**

8.1 Non-Cost Portion. The following information must be included in the non-cost portion of the proposal. A proposal lacking any of the following information may be deemed non-responsive.

a. The Proposer’s name, address, telephone and fax numbers, and federal tax identification number. Note that if the Proposer is a sole proprietor using his or her social security number, the social security number will be required before finalizing a contract.

b. Name, title, address, telephone number, and email address of the individual who will act as the Proposer’s designated representative for purposes of this RFP.

c. Model number(s), specifications, or other description of the software the Proposer proposes to supply to the JBE, including warranty information.

d. A copy of Attachment 7, Reference Form with the names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Proposer has provided similar goods. The JBE may check references listed by the Proposer.

e. Proposed method to complete the work, including the following:

i. Section 2.3 Functional Requirements, completed response for Tables 1, 2 including Table 3, if applicable.

ii. Describe the level of data security, backup and disaster recovery offered by your company to ensure the integrity of the calendar scheduling data.

iii.Please describe the process whereby the Judicial Council will be able to access stored data after the contract expires. Please include the process to move the stored data from one system to another system, especially in a situation whereby the data is transferred to another company.

iv. Provide your companies terms and conditions for software licensing, maintenance and support specific to the proposed software.

f. Acceptance of the Terms and Conditions.

i. On Attachment 3, the Proposer must check the appropriate box and sign the form. If the Proposer marks the second box, it must provide the required additional materials. An “exception” includes any addition, deletion, or other modification.

ii. If exceptions are identified, the Proposer must also submit a red-lined version of the Terms and Conditions that implements all proposed changes, and (b) a written explanation or rationale for each exception and/or proposed change.

g. Certifications, Attachments, and other requirements.

i. The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.

ii. If Contractor is a California corporation, limited liability company (“LLC”), limited partnership (“LP”), or limited liability partnership (“LLP”), proof that Contractor is in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor conducts or will conduct (if awarded the contract) intrastate business in California, proof that Contractor is qualified to do business and in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor does not (and will not if awarded the contract) conduct intrastate business in California, proof that Contractor is in good standing in its home jurisdiction.

iii. Proposer must complete and submit the required attachments, as applicable as listed in Section 4.0

8.2 Cost Portion. The following information must be included in the cost portion of the proposal.

1. Propose your licensing model and costs for the three (3) year initial term.
2. Propose your licensing model and costs each of the seven (7) one (1) year option term(s).
3. If applicable, propose the costs for stored data and any volume level(s) of storage offered.
4. If applicable, propose the costs for the Judicial Council to access stored data after the expiration period of the agreement.
5. If applicable, propose the costs to transfer the Judicial Council’s data to another server website or Contractor.

**NOTE:** It is unlawful for any person engaged in business within this state to sell or use any article or product as a “loss leader” as defined in Section 17030 of the Business and Professions Code.

**9.0 OFFER PERIOD**

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

**10.0 EVALUATION OF PROPOSALS**

The cost portion of proposals will be publicly opened at the date and time noted in Section 3.0 at the Judicial Council of California in San Francisco, CA.

The Judicial Council will evaluate the proposals on a 100 point scale using the criteria set forth in the table below. Award, if made, will be to the highest-scored proposal.

If a contract will be awarded, the Judicial Council will post an intent to award notice at www.courts.ca.gov/rfps.htm.

| **CRITERION** | **maximum number of points** |
| --- | --- |
| Cost | 50 |
| Ability to provide the Functional Requirements and Technical Specifications in Sections 2.3 and 2.4 | 25 |
| Additional Features/Functionality offered | 15 |
| Acceptance of the Terms and Conditions | 10 |

**11.0 INTERVIEWS – PRODUCT DEMONSTRATION**

The Judicial Council may conduct interviews with Proposers to clarify aspects set forth in their proposals or to assist in finalizing the ranking of top-ranked proposals. The interview process may require a demonstration. The interview may also require a demonstration of equivalence if a brand name is included in the specifications. The interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the Judicial Council’s offices. The Judicial Council will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The Judicial Council will notify eligible Proposers regarding interview arrangements.

**12.0 CONFIDENTIAL OR PROPRIETARY INFORMATION**

**Proposals are subject to disclosure pursuant to applicable provisions of the California Public Contract Code and rule 10.500 of the California Rules of Court.** The Judicial Council will not disclose (i) social security numbers, or (ii) balance sheets or income statements submitted by a Proposer that is not a publicly-traded corporation. All other information in proposals will be disclosed in response to applicable public records requests. Such disclosure will be made regardless of whether the proposal (or portions thereof) is marked “confidential,” “proprietary,” or otherwise, and regardless of any statement in the proposal (a) purporting to limit the Judicial Council’s right to disclose information in the proposal, or (b) requiring the Judicial Council to inform or obtain the consent of the Proposer prior to the disclosure of the proposal (or portions thereof). Any proposal that is password protected, or contains portions that are password protected, may be rejected. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

**13.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE**

The Judicial Council has waived the DVBE incentive in this solicitation.

**14.0 SMALL business preference**

Small business participation is not mandatory. Failure to qualify for the small business preference will not render a proposal non-responsive.

Eligibility for and application of the small business preference is governed by the Judicial Council’s Small Business Preference Procedures for the Procurement of Information Technology Goods and Services. The Proposer will receive a small business preference if, in the Judicial Council’s sole determination, the Proposer has met all applicable requirements. If the Proposer receives the small business preference, the score assigned to its proposal will be increased by an amount equal to 5% of the points assigned to the highest scored proposal.

To receive the small business preference, the Proposer must be either (i) a Department of General Services (“DGS”) certified small business or microbusiness performing a commercially useful function, or (ii) a DGS-certified small business nonprofit veteran service agency.

If the Proposer wishes to seek the small business preference, the Proposer must complete and submit with its proposal the Small Business Declaration (Attachment 5). The Proposer must submit with the Small Business Declaration all materials required in the Small Business Declaration.

Failure to complete and submit the Small Business Declaration as required will result in the Proposer not receiving the small business preference. In addition, the Judicial Council may request additional written clarifying information. Failure to provide this information as requested will result in the Proposer not receiving the small business preference.

If the Proposer receives the small business preference, (i) the Proposer will be required to complete a post-contract report; and (ii) failure to meet the small business commitment set forth in its proposal will constitute a breach of contract.

**FRAUDULENT MISREPREPRETATION IN CONNECTION WITH THE SMALL BUSINESS PREFERNCE IS UNLAWFUL AND IS PUNISHABLE BY CIVIL PENALTIES. SEE GOVERNMENT CODE SECTION 14842.5.**

**15.0 PROTESTs**

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contracting Manual (see *www.courts.ca.gov/documents/jbcl-manual.pdf*). Failure of a Proposer to comply with the protest procedures set forth in that chapter will render a protest inadequate and non-responsive, and will result in rejection of the protest. The deadline for the Judicial Council to receive a solicitation specifications protest isBid Closing Date.

The deadline for an award protest would be five (5) court days after the posting of the Notice of Intent to Award.

Protests must be sent to:

Lenore Fraga-Roberts – ADMIN-2018-04-LB

[solicitations@jud.ca.gov](mailto:solicitations@jud.ca.gov)

Branch Accounting and Procurement | Administrative Division

Judicial Council of California

455 Golden Gate Avenue

San Francisco, CA 94102-3688