



REQUEST FOR INFORMATION

JUDICIAL COUNCIL OF CALIFORNIA

REGARDING:

RFI TITLE: FACILITIES SERVICES
OFFICE (FSO), CAFM 2.0 PROJECT FOR
AN INTEGRATED WORKPLACE
MANAGEMENT SYSTEM (IWMS)

RFI NUMBER: IT-2019-01-BD

RFI RESPONSE DUE:

Friday, May 3rd, 2019 NO LATER THAN
5:00 P.M. PACIFIC TIME [*REVISED*]



1.0 RFI Preface

Greetings solution vendors of California. The Judicial Council of California (JCC), Facilities Services Office (FSO) invites you to participate in its Request for Information (RFI) for an Integrated Workplace Management System (IWMS). This is an opportunity for qualified Vendors to respond with information to assist the Judicial Branch in planning for the next generation Facilities Management system.

The Judicial Council of California, chaired by the Chief Justice of California, is the chief policy making agency of the California Judicial System. The Facilities Services Office of the Judicial Council is responsible for managing the state judiciary's portfolio. Facilities Services manages ongoing operational needs for over four hundred and seventy five (475) court judicial branch facilities, as well as site selection and acquisition for new capital projects.

The goal of this RFI is to understand your firm's current solution and service offerings by gathering RFI responses for technical response and estimated cost information for the Judicial Council Facilities Services' CAFM 2.0 Project for an Integrated Workplace Management System (IWMS). The cost information will be used to build a business case for budgeting purposes. This RFI is an opportunity for response vendors to share information regarding their current solution and service offerings. Following the closure of this RFI, response vendors may be invited to participate in an information exchange with Judicial Council staff, to present their solution in detail and provide a demo focused on the JCC's key areas of interest.

2.0 Background Information

The Judicial Branch's current system is referred to as CAFM, a Computer Aided Facilities Management application utilized to manage the maintenance and real estate workload for the state judiciary's portfolio. The first implementation of CAFM occurred in 2004 – 2005, utilizing the TRIRIGA software product. The current implementation of CAFM substantially took place between 2008 – 2011. The Judicial Council's CAFM Team has implemented fixes and enhancements from 2012 to the present (2019).

Facilities Services primarily uses CAFM to receive and authorize Service Work Orders (SWO) for demand maintenance, preventive maintenance, and facility modifications. FSO processes on average 6,110 SWOs a month. There are currently 940 CAFM users, with Court users representing the largest segment totaling 344, and service providers totaling 195, representing the second largest segment of users.

Since the installation of the CAFM system over fourteen years ago, there have been significant advances in its functionality, as well as how systems such as IWMS are deployed (e.g. on-premise or cloud). Facilities Services extensively configured and enhanced the original CAFM system to meet its business needs, and this has hindered



the ability to take advantage of new technological advancements with application upgrades.

Configurations and enhancements made to the software system have been incorporated to meet Facilities Services' unique business processes. For example, the system has been configured to include specific contractual provisions, such as requiring that all services costing less than \$2,000 be included as part of the "firm fixed price" component of the contract rather than separate charges. The consequence of certain configurations and development approaches have resulted in impeding software upgrades to the latest version with ease.

FSO currently relies on external spread sheets and separate software systems used in conjunction with CAFM to meet its business need. The FSO seeks a solution that will that will minimize redundancy by consolidating functionality into a single system. Several additional factors will need to be taken into consideration to reach our goal of a new and improved Facilities Management system. These include but are not limited to the following:

- i) A real estate portfolio of over twenty (20) million square feet of space;
- ii) Complexities involved to ensure the smooth operation of thousands of installed assets;
- iii) The need to minimize disruptions to diverse court operations that take place in the facilities;
- iv) The need for seamless communication with a statewide constituency of facility users, called court facility liaisons.

The Facility Information Technology Governance Group (FIT GG) has been meeting for months to gather information needed to address FSO's interests, needs, and business requirements in order to define the next generation Facilities Management system. FIT GG has considered the system features required to enable each business unit to perform its duties, and the unique requirements of Judicial Council's Facilities Services organization; which are known as **the CAFM 2.0 Requirements**.

3.0 RFI DESCRIPTION OF GOODS AND/OR SERVICES

3.1 JCC Facilities Services CAFM 2.0 Requirements

CAFM 2.0 Requirements cover multiple areas of Facilities Services' business operations, including but not limited to:

- Facility Operations,
- Project Management,
- Real Estate Services,
- Quality Assurance/Quality Compliance,
- Risk Management,



- Emergency Planning and Security Coordination,
- Environmental Health and Safety,
- Asset Management, etc.

The business, functional and non-functional requirements can be found in the IT-2019-01-BD CAFM 2.0 Requirements document, Appendix II to this RFI. (See section 5.0 RFI Attachments below)

The current solution shall be based on the IT-2019-01-BD CAFM 2.0 Requirements noted in Appendix II, as follows:

- Facilities Services - Business Requirements
- Application Technical Requirements
- Security & Encryption Requirements
- Migration & Integration Requirements
- Hosting Requirements (SaaS, IaaS, etc.)
- Service Level Requirements
- File Format Requirements

3.2 VENDOR RESPONSE TO RFI

FSO requests that vendors provide their current solution for the next generation CAFM 2.0, as both a technical response and estimated cost response. Details on how to submit current solution response information can be found in the Vendor Response Template, Appendix I attachment to this RFI, (see section 5.0 RFI Attachments below). The RFI Response Checklist can be found at the end of the Appendix I document.

4.0 TIMELINE FOR THIS RFI

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

EVENT	DATE
RFI issued	Friday, March 29th, 2019
Deadline for questions	Friday, April 5th, 2019
Questions and answers posted	Friday, April 12th, 2019
Latest date and time Information Response Package may be submitted	<i>Friday, May 3rd by 5:00 PM Pacific Time [Revised]</i>



5.0 RFI RESPONSE ATTACHMENTS

The following attachments are included as part of this RFI for Vendor Response submissions:

#	ATTACHMENT Title	DESCRIPTION	Filename
1	Appendix I: Vendor Response Template	Primary RFI response template that provides details on how to submit current solution response. This must be submitted with response package.	<i>IT-2019-01-BD CAFM 2-0 RFI VendorResponse_TEMPLATE.docx</i>
2	Appendix II: CAFM 2.0 Requirements	FSO's CAFM 2.0 Requirements, to be used by the vendor to complete and provide a current solution response (e.g. Response Code category) to each requirement, for JCC's viable Solution considerations. This must be submitted with response package.	<i>IT-2019-01-BD CAFM 2.0 Requirement.xlsx</i>
	Appendix II: Glossary	A glossary of acronyms/terms used in the California State Judicial Branch for reference.	<i>See [Acronyms & Def] worksheet in IT-2019-01-BD CAFM 2.0 Requirement.xlsx</i>
3	Appendix III: RFI Pricing/Cost Workbook Template	The CAFM 2.0 RFI Cost Workbook shall include the vendor's estimated pricing information for JCC's budget considerations. This must be submitted with response package.	<i>IT-2019-01-BD CAFM 2-0 RFI Pricing_TEMPLATE.xlsx</i>

6.0 SUBMISSIONS OF RESPONSES

- 6.1 Responses should provide straightforward, concise information that satisfies the requirements of the "Response Contents" (See section 5.0 RFI Response Attachments). Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the RFI's instructions and requirements, and completeness and clarity of content.
- 6.2 Vendor's responses, including of Appendixes I, II, and III, may be delivered by mail on a non-rewriteable flash drive to the below address, **or** may be sent via email by the date and time listed on the coversheet of this RFI in the following format:
- a. Email shall be sent to: solicitations@jud.ca.gov
 - b. Mailed flash drives shall be sent to:
Attention: Sheryl Berry, Administrative Assistant II
Branch Accounting and Procurement
455 Golden Gate Avenue, 6th Floor



San Francisco, CA 94102

c. The vendor must provide their firm's name, along with the RFI title and number in the subject line of the email, **or** if sent via mail, on the envelope containing the flash drive.

7.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

RESPONSES 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 vendor that is not a publicly-traded corporation. All other information in responses will be disclosed in response to applicable public records requests. Such disclosure will be made regardless of whether the response (or portions thereof) is marked "confidential," "proprietary," or otherwise, and regardless of any statement in the response (a) purporting to limit the Judicial Council's right to disclose information in the response, or (b) requiring the Judicial Council to inform or obtain the consent of the vendor prior to the disclosure of the response (or portions thereof). Any response that is password protected, or contains portions that are password protected, may be rejected. Vendors are accordingly cautioned not to include confidential, proprietary, or privileged information in responses.

8.0 INFORMATION EXCHANGE

8.1 After the Judicial Council has reviewed the submitted material, your firm may be contacted and asked to participate in an information exchange with Council staff. The objective of this is to gain further understanding of your proposed approach or solution.

Information exchange can take the form of additional phone conversations, in-person meetings, and/or application demonstrations (in-person or via the web). It is important to note that the Judicial Council will not reimburse Vendors for any expenses, travel and/or time etc., incurred due to your participation in information exchange activities.

9.0 DISCLAIMER

This RFI is issued for information gathering and planning purposes only and does not constitute a solicitation for proposal. Responses to the RFI will not be returned. A response to this notice is not an offer and cannot be accepted by the Judicial Council to form a binding contract. Responders are solely responsible for all



expenses associated with responding to this RFI. All interested parties should submit a cover sheet, and company description with appropriate supporting information clearly marked:

“Response to RFI IT-2019-01-BD - FACILITIES SERVICES’ CAFM 2.0 PROJECT”

Responses shall be submitted by no later than 5:00 PM, Pacific Time, on *Friday, May 3rd* by following the directions noted above in RFI Section 6.2(a) and as indicated in attached Appendixes I, II, and III. *[Revised]*

Note: Nothing in this section limits the Judicial Council’s ability to use an RFI. An RFI is used to gather information about goods or services available in the marketplace, what goods or services generally cost, or similar topics. An RFI is not used to separate those Prospective Bidders that intend to participate in an upcoming solicitation from those that have no interest in participating.

END OF RFI FORM