RFP Number: RFP-OCR23-154RB
RFP Title: Power BI training services
ANSWERS TO QUESTIONS

1.   What is the requested class size? The class size has not been specified so that bidders can propose a viable class size based on their prior experience and knowledge. Previously, we capped class size at 60 students so that instructors could interact with students, answer questions, etc.

2.   Section 7.0 PROPOSAL CONTENTS Item c. asks for resumes of 'key staff members. Are resumes for Course Developers and Instructors sufficient or do you require resumes for our account management and operations team members? Key staff members include people that the Judicial Council will be interacting with on the project. In addition to course developers and instructors, please include the resumes of the primary project manager serving as a liaison to the Judicial Council for this RFP.

3.   The RFP has several key technical requirements that require a higher effort level. Will the State consider an RFP due date extension by one week? No.

4.   The RFP Section 2.0 DESCRIPTION OF SERVICES AND DELIVERABLES refers to 3 tracks broken out by user roles (casual, designer, administrator). Are the tracks required within each user type only or are you looking for a progressive track between roles? Within each type. Progression would be the exception, not the rule.

5.   The RFP Section 1.0 BACKGROUND INFORMATION refers to instructor-led webinars. Are instructor-led webinars the same thing as live instructor-led virtual training? Are you looking for any on-site training? The trainings should be virtual (i.e., on a platform like Teams, Zoom, etc.) and "live" meaning that they are not pre-recorded, and they should take place in real time.

6.   Which Power BI roles control user access to the data in the Power BI report? Administrator

7.   To what degree do they require training on paginated reports? If you feel this is an important feature related to one of the user roles, please include it.

8.   Is payment approved at the end of each individual phase or the end of all phases 1-5? End of each phase.

9.   Regarding DVBE participation outlined in 12.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE, there is no information on the number of points to be added for participation in Section 10.0 as written in paragraph 2. Please provide number of points. See Amendment 1.

10.   In Section 6.0 SUBMISSIONS OF PROPOSALS, 6.2 asks for proposal submissions by email Please clarify. Send all parts of the proposals only via email to solicitations@jud.ca.gov.

11.   What is the approx. budget to support the scope of this work? Not to exceed $96,000.

12.   What LMS and/or other learning platforms/tools does JBE use? This question is not relevant to the current proposal.

13.   Does JBE current use an operating model (including SOPs and Roles/Responsibilities) or specific use cases for engaging with data and delivering reporting/analytics? If so, can you provide for reference? No.

14.   Does JBE have any existing productized solutions in Power BI? Do other portions of the organization already use Power BI? The branch is in early stages of Power BI adoption. Yes, there are portions of the organization that already use it.

15.   What systems / processes are currently used to manage course registration? This is regarding "Manage all aspects of course registration, including registration, participant tracking, post-class satisfaction survey, and issuance of certificates of completion to participants who attend the entire sessions." We have an in-house system to manage the course enrollment process for other types of trainings.

16.   What internal L&D resources (personnel, technologies) does JBE currently employ? Unclear what the acronym refers to.

17.   Has JBE used experiential learning (e.g., simulations) in the past and to what extent? Yes, many JBE classes use simulations or scenarios for training.

18.   How does JBE measure learning currently? If so, what frameworks (ex. Kirkpatrick Levels of Evaluation), tools, or methodologies do you use? The selected vendor should use whatever tools or frameworks they utilize to measure learning.

19.   Does JBE utilize any external eLearning vendors (e.g., LinkedIn Learning) or plan on doing so to support this PowerBI training curriculum? Yes, and that might be a consideration in the future.

20.   Is this learning program associated with any other learning programs or strategic initiatives? If so, what programs or initiatives? The branch has only recently adopted Power BI as its BI solution. This supports branch data initiatives around enhanced branch data literacy and adoption of tools to facilitate data and information sharing.

21.   The RFP references this training program as "turn-key." Please elaborate on the intended meaning of this term. The vendor is expected to deliver a completed set of trainings that is ready to deploy.

22.   The RFP details 4 training that will be delivered 4 times each. How long do you expect each (a) casual learner, b) admin, c) designer bootcamp, and d) designer long-form class) training to last? That is up to the vendor based on the list of required course content.

23.   What is the approximate size of the target audience (by personas)? There are about 2,000 judicial officers, 17,000 court staff, and 700 Judicial Council staff that potentially could take these classes, although it is not expected that all of those audiences will take the training. In terms of personas, judicial officers will mostly take the casual user training and will have little experience with Power BI. Court staff and Judicial Council staff could potentially take all three classes. There is a range of experience levels, but overall, most people are at the beginning stages of learning Power BI. Advanced users probably won't sign up for these classes.

24.   What internal resources and how many will be trained through the train-the-trainer (T3) program? Approximately ten project managers will be trained through the train the trainer program.

25.   We believe best-in-class instruction must accommodate multiple modalities. Does JBE have any preference or requirements on how training is delivered, and classes are engaged? If so, what are they? See answer to question #5.

26.   Being that one session must be recorded, does JBE have preference (if so, what is it?) to virtual or in-person instructor led trainings (ILTs)? See answer to question #5.

27.   With Certificates of Completion being awarded for completion, is there a requirement for end users to demonstrate learning objectives have been met through application of Power BI Concepts? The selected vendor should make a recommendation for how to approach this, but there are no JCC requirements to be applied to this training.

28.   How will associated learning aids be stored / knowledge managed for long-term use? Recordings would be posted on an internal SharePoint site with access only to branch entities.

29.   How will this training / administration be met after this engagement? We presume recordings will be watched and completion of learning materials. See answer to question #27.

30.   Is there an expectation that any of the prescribed training be delivered in person or is online acceptable? See answer to question #5.

31.   How many sessions of live training per user persona are expected? This question is answered in the RFP.

32.   Does the Judicial Council have a system in place for course registration and tracking? If so, what system is it? See answer to question #15.

33.   For training, does the Judicial Council expect training to be conducted on the Judicial Council Power BI instance using Judicial Council data? Or is it expected that sample data will be used on the vendor's Power BI instance? Vendors should conduct the training on their own Power BI instance using sample data. It's preferred that the vendor utilize sample data that is relevant to the Judicial Branch (i.e., not sales and marketing data).

34.   We understand the proposal must be submitted in two parts, but we were wondering if the proposals are to be submitted in email as referenced in 6.3. See answer to Question #10.

35.   Are the classes required to be taught onsite or can they be conducted virtually? See answer to question #5.

36.   What kind of data would you prefer to be used for the classes? Is it the intention to use Judicial Council Data for training or already created Microsoft training data? See answer to #33.
37.   How many days would you like each class to be? See answer to question #22.
38.   When we did Casual User training for you in 2019, the training was in 90-minute sessions, and we did multiple training sessions on the same day. Would this work for this engagement? It is fine to hold multiple sessions in a day, but the trainings should be spread out over multiple weeks or months to account for those who might be on vacation or not available on a particular day.
39.   For Designers, we understand you are looking for a one-day quick start for the first type of training for this group, but how many days of training are you looking for the second type of training? See answer to question #22.
40.   Do you have a current training vendor that is unable to fulfill the Power BI training needs? If so, what is the name of that training vendor? We do not have a current vendor for this training.
41.   Understanding that you are requesting a firm fixed price for each phase of the RFP, our team would like to understand the reasoning for payment related to those phases. Our team is concerned that if 4 training classes aren't run in a short period of time, we will not be paid. What happens if 3 training classes are completed, but a 4th class cancels due to low enrollment and no training is done for 6 months? The phased payment allows for incremental payments rather than a single payment at the end of the completed training. We will work with vendors to help ensure that the scenario described does not occur. For example, we could replace one type of training with another, if a class cancels due to no/low enrollment.
42.   What is the preferred delivery format for the Power BI training—virtual, in-person, or a combination? See answer to question #5.
43.   Will the training primarily consist of instructor-led sessions, or are there e-learning components involved? Instructor-led sessions.
44.   Who is the intended audience for the training, and are there specific roles, departments, or skill levels targeted? See answer to question #23.
45.   What is the expected duration and frequency of the training sessions? For instructor-led? E-learning? This is answered in the RFP and in question #22.
46.   How many participants are anticipated to take part in the training? See answer to question #23.
47.   Is there a requirement for assessments or certifications upon completion of the training?
48.   Are you available to meet on a call prior to delivering the proposal? No.
49.   Can you provide us access to the existing content/source materials? Not during the RFP process.
50.   Do you currently have any training materials or content related to Power BI that can be leveraged for this project? See answer to #49.
51.   What is the state of content development, and do you have subject matter experts available if content needs to be customized or developed? We are issuing this RFP to locate a vendor to develop content. We have business SMEs available to customize content. We don't have Power BI SMEs.
52.   Has the existing content been reviewed for accuracy and relevance, and are there any gaps that need to be addressed? See answer to #51.
53.   Are there any accessibility requirements that we should be aware of for this project? None known at this time.
54.   What do you value most in a vendor relationship? What have you liked or disliked about your experience working with vendors? Decline to respond, not a clarifying question.
55.   Are there any specific budget constraints or limitations for this Power BI training project? See answer to question #11.
56.   Is there a budget range that you anticipate for this learning experience? See answer to question #11.
57.   Do you have examples of budget ranges from previous projects similar to this? No.
58.   Could you provide a breakdown of the budget allocation for different components of the project, such as training delivery, materials, and any additional costs? No.

59.   When is the expected start date for the Power BI training project? This question is answered in the RFP.

60.   What is the estimated duration of the entire project, including designing, development, and delivery? This question is answered in the RFP.

61.   Are there any critical milestones or deadlines within the project timeline that we should be aware of? Please see Standard Agreement (attachment 2) of the RFP.

62.   If the training consists of multiple sessions, what is the proposed schedule for these sessions? This question is addressed in the RFP.

63.   How will trainers or participants access the training materials and resources?

    A. Will the Judicial Council of California own the content created for 1 & 3 below? Our courses will likely be standard vendor content owned by Microsoft. Yes, the JCC.
    1. Plan, design, and develop Power BI class curriculum suitable for learners of various skill and ability.
    2. Create training materials such as presentations, learning aids or videos for later reference.

    B. How long should the recordings be made available and who will have access to the replay? Assuming the replay will be for students that have taken the class?
    At least one session of each type must be recorded and enabled for replay.

64.   Page 6 – Clarify if complete proposals need to be submitted via email. See answer to Question #10.

65.   Page 2 – Clarify deliver. Is training to be delivered Live Virtual Instructor-led or Live Onsite Instructor-led? See answer to question #5.

66.   How many students anticipated for each class? See answer to question #1.

67.   How many classes for each of the set of user audiences? Example – how many classes for Casual User, Designers, and Administrators? This question is answered in the RFP.

68.   How many days are you expecting for each class as the more advanced classes would be priced higher then for the casual users? See answer to question #22.