



Request for Information

REGARDING: INTEGRATED
WORKPLACE MANAGEMENT SOLUTION
(IWMS)

RFI NUMBER: REFM-2016-07-SS

RESPONSES DUE:
3:00 P.M. PACIFIC TIME, JUNE 24, 2016

**REQUEST FOR INFORMATION: INTEGRATED WORKPLACE
MANAGEMENT SOLUTION (IWMS), RFI NUMBER: REFM-2016-07-SS**

THE OPPORTUNITY

You are invited to respond with information to assist the Judicial Council of California (“Judicial Council”) in identifying an Integrated Workplace Management Solution (IWMS) that includes modules designed to accommodate the needs of facilities management and maintenance, real estate, capital projects, and environmental and energy management within a single software platform.

The Judicial Council of California, chaired by the Chief Justice of California, is the chief policy making agency of the California judicial system. The office of Real Estate and Facilities Management (REFM) of the Judicial Council is responsible for managing the state judiciary's portfolio. REFM manages ongoing operational needs for more than 500 court judicial branch facilities, as well as site selection and acquisition for new capital projects.

Major areas of responsibility include management of a \$216 million budget and staff of over 75 employees; acquisition and assemblage of sites for the capital construction programs; analysis of, and transactions related to, 270 leases, licenses and MOUs per year; administration of 362 leases representing millions of dollars in contractual obligations; environmental regulatory compliance of over 500 facilities; operation, maintenance, repair and modifications to a 20 million square foot portfolio of court properties housing the largest judiciary in the United States.

In addition to the IWMS, we are also seeking solutions that have a mobile interface, and could be hosted in the cloud or in a hybrid infrastructure. The system should be able to process invoices, and interface with a data warehouse, reporting tools, Oracle financials, and other applications if needed.

The primary objective of this Request for Information (“RFI”) is to gather information on qualified IWMS’s that can provide a one-stop “management” of REFM’s business-critical services.

GENERAL REQUIREMENTS

The following are the primary considerations that we would like addressed in this RFI:

FUNCTIONAL

1. Ability to provide “one-stop” hosting, and design and development support.
2. We are seeking a versatile, configurable workflow function that is capable of scaling up and down for multiple users and offers tiered user permissions/groups.
3. Version control/rollback: we are looking for information on version control and back-up/rollback capabilities.
4. We are seeking a solution that is built upon a responsive framework, enabling us to successfully deliver content on tablets, phones, laptops, and desktop computers.

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5. We are seeking approaches and methods for managing the migration of legacy data to a new system, including information about automated processes and technical dependencies associated with any such solution.

6. Facilities Management: The new solution is required to include a facility maintenance and project module with the ability to track full life cycle costs, as well as status, from requirement identification through completion. Requirements include, but are not limited to:
 - Demand Maintenance
 - Preventive and Predictive Maintenance
 - Project Management
 - Cost accounting for labor, material and contracts
 - Material Control
 - Procurement and Contracting Management
 - Asset Management
 - Asset life cycle tracking and renewal planning
 - Budget management and projects
 - Built- in industry-recognized, estimating tool, or the ability to interface with one
 - Ability to share cost tasking with multiple owners
 - Reporting capabilities at all levels

7. Real Estate: The new solution is required to include a property module for both leased and owned properties with the ability to track full cycle transactions, acquisition through disposition. Requirements include, but are not limited to:
 - Transaction Management
 - Lease Management
 - Owned Property contract management
 - Lease Accounting (AP and AR)
 - Reporting
 - Integration with Oracle

8. Environmental Services & Compliance: The new solution is required to support environmental compliance and sustainability efforts, including:
 - Permit tracking and reporting, including:
 - Permits at the facility level;
 - Permits at the equipment level;
 - Permit payments;
 - Permit reporting.
 - Utility tracking and reporting at the facility and equipment level, including:
 - Basic utility account information including:
 - Account information;
 - Account payments; and

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- Use and cost information for electricity, gas, and water by facility and equipment.
 - Utility Reports
 - Use information by a variety of factors including, equipment, building, building size, court, and region;
 - Cost information by a variety of factors including, equipment, building, building size, court, and region;
 - Carbon/greenhouse gas emission tracking.
9. Other desired functionality include procurement capabilities to allow contractors to submit proposals, pictures, change orders and invoices through the system; risk management; fix/enhancement ticketing solutions, etc.
10. Applications can be as:
- Another Out of the Box, self-contained IWMS CAFM/IWMS
 - A Best in Breed solution, utilizing individual applications tied together and a common database, through APIs or alternative technologies
 - Some combination of a and b.

PRICING

Pricing structure or pricing models for the following:

- Set-up costs
- Hosting plan costs
- Developer support services
- Customer Support/Help Desk services
- Other pricing information you deem relevant

SUBMISSION INFORMATION

Response Format:

1) Cover Sheet, including:

- Company Name
- Company Address
- Name and Contact Information for Company Representative, including:
 - Telephone Number
 - E-mail Address
 - Signature of Representative
- RFI Number: REFM-2016-07-SS

2) Brief company description; size of company; years in business; type of entity.

INFORMATION EXCHANGE

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.

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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 you for any expenses, travel and/or time etc., regarding information exchange activities.

DISCLAIMER

This RFI is issued for information and planning purposes only, and does not constitute a solicitation. 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 – INTEGRATED WORKPLACE MANAGEMENT SOLUTION (IWMS) by 3:00 PM, Pacific Time, on June 24, 2016 to the following point of contact:

Judicial Council of California
Attn: Nadine McFadden
455 Golden Gate Avenue, 6th Floor
San Francisco, CA 94102
solicitations@jud.ca.gov

Note: Nothing in this section limits the Judicial Council's ability to use a 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 FORM