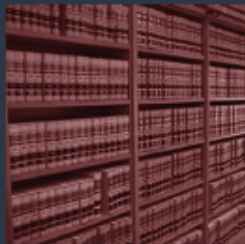


Enterprise Content Management

Pre-Proposal Conference
for RFP No. ISD2006ECM-SS
December 6, 2006

California Administrative Office of the Courts
Information Systems Division



ADMINISTRATIVE OFFICE
OF THE COURTS

Agenda

- Welcoming Remarks
- Conference Protocol
- Team Introductions
- Project Objectives
- Project Roadmap
- Project Scope
- Research
- RFP Highlights
- Critical AOC Procurement Policies
- Review of Procurement/Selection Timetable
- Submission of vendor's written questions
- Q&A
- Next steps/closing



Welcome

➤ Mark Yuan, AOC Supervisor



ADMINISTRATIVE OFFICE
OF THE COURTS



Conference Protocol

- Clarification, not new information
 - If you feel the RFP is missing information, please submit a proposal in writing per RFP guidelines
- Please hold questions to end of the presentation
- The AOC team will address questions verbally in this forum
 - If you want the response in writing, submit the question in writing per RFP guidelines





AOC Team Introductions

- Mark Yuan ➤ AOC Supervisor
- Jamel Jones ➤ AOC Sr. Analyst
- Melissa Land ➤ Project Consultant
- Stephen Saddler ➤ Contracts Officer





Melissa Land

- Project Consultant
 - Project objectives, roadmap, scope and overview



ADMINISTRATIVE OFFICE
OF THE COURTS



Project Objective

- To define, *select* and *implement* a scalable enterprise content management framework, providing an intuitive system for the organization and dissemination of electronic content to internal and external stakeholders.
- This framework will address immediate organizational requirements for core content management tools as well as provide a scalable solution for future requirements of the AOC and California Courts.

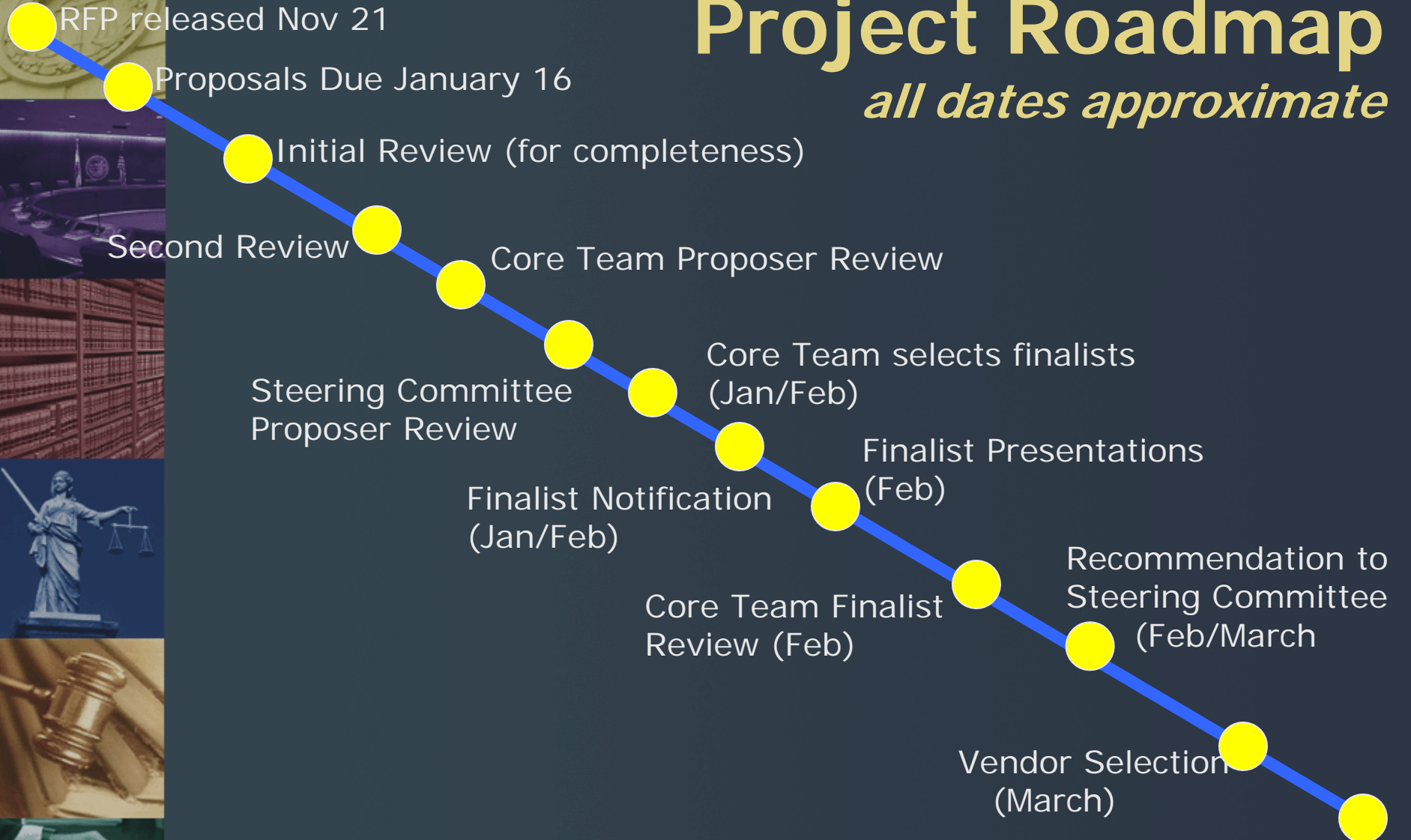
RFP Section: 1.0



ADMINISTRATIVE OFFICE
OF THE COURTS

Project Roadmap

all dates approximate



Contract Negotiations
Early Q207



ADMINISTRATIVE OFFICE
OF THE COURTS

Project Scope

- Administrative Office of the Courts
- California Courts of Appeal
- California Supreme Court
- Indirect: *California Trial Courts*

RFP Section: 6.0



ADMINISTRATIVE OFFICE
OF THE COURTS



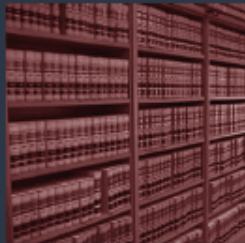
Research for the RFP

- 90+ staff interviewed
- All AOC Divisions/Regional Offices
- Supreme Court
- District Courts of Appeal
- California Judicial Center Library
- Technical Team
- Analysis of current processes, solutions and challenges



ADMINISTRATIVE OFFICE
OF THE COURTS

RFP Highlights



ADMINISTRATIVE OFFICE
OF THE COURTS



RFP: Single Vendor Partner

The AOC wishes to work with a
single point of contact

- A proposed solution may leverage many technologies
- A proposal may span multiple software vendors and/or consultancies

RFP Section: 2.3



ADMINISTRATIVE OFFICE
OF THE COURTS

RFP: Functional Requirements

- Document Management
- Web Content Management
- Learning Content Management
- Collaboration
- Digital Asset Management
- Enterprise Search
- Business Process Management
- Reporting and Security
- Technical and Administrative





RFP: Functional Requirements

- Responding to functional requirements
 - Response key review
 - 1) Item is "Out Of Box"
 - 2) Item will be included in future release
 - 3) Item addressed by third-party integration- specify partner
 - 4) Item requires customized code to be written
 - 5) Item not addressed by solution
 - An answer of 5 (five) *does not* preclude a proposal from consideration

RFP Section: 9.8



ADMINISTRATIVE OFFICE
OF THE COURTS

RFP: Networking and Computing Environments

- Oracle
- TIBCO

RFP Section: 7.0



ADMINISTRATIVE OFFICE
OF THE COURTS

RFP: Implementation

- Initial proposal
 - *Best practice* based
- Detailed proposal
 - Finalists only
 - Informed by additional documentation
 - Expand on initial plan

RFP Section: 9.10



ADMINISTRATIVE OFFICE
OF THE COURTS

RFP: Submission Guidelines

- 1 (one) original, 5 (five) copies
 - Proposal
 - Cost Proposal submitted separately
- Proposals must be delivered to the individual listed under Submission of Proposals
- Electronic version on CD-ROM
 - entire proposal
 - requested samples
 - financial information
- Simple, straightforward, concise

RFP Section: 8.0



ADMINISTRATIVE OFFICE
OF THE COURTS

RFP: Main Proposal Document

- Title page
- Letter of Transmittal
- Table of Contents
- Executive Summary
- Scope of Services
- Company /Team Background and resource capabilities
- Proposed Application Software and Computing Environment
- Responses to Functional/Technical Requirements
- System Security
- ECM Implementation Plan
- Development and Staging Environment Hardware & Software
- Training Plan
- Testing Strategy
- Maintenance and Support Program
- Hosting Arrangement
- Client References
- Cost Proposal
- Exceptions to the RFP
- Sample Documents

RFP Section: 9.0



ADMINISTRATIVE OFFICE
OF THE COURTS

RFP: Vendor Selection Process

Proposals Due January 16, 2007

Initial Review (for completeness)

Second Review

Core Team Proposer Review

Core Team selects finalists

Steering Committee
Proposer Review

Finalist Notification

Finalist Presentations

Core Team Finalist
Review

Recommendation to
Steering Committee

Steering Committee Finalist Review

Vendor Selection

RFP Section: 10.0



ADMINISTRATIVE OFFICE
OF THE COURTS



RFP: Vendor Evaluation Criteria

Written Proposals

- Software functionality and completeness
- Technical compliance
- Proposed implementation plan and methodology
- Customer references
- Training and support
- Long term viability/corporate health
- Total cost of ownership and exceptions to RFP

Finalist Presentations

- Presented solution to use cases
- Software ease of use
- Technical capability
- Detailed implementation plan and interviews

RFP Section: 11.0



ADMINISTRATIVE OFFICE
OF THE COURTS



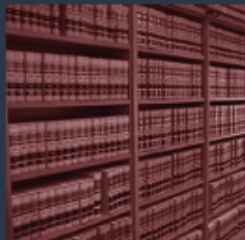
→ **Stephen Saddler**

- Procurement Timetable
- Critical AOC procurement policies
- Submission of Written Questions (Due Dec. 11, 1:00 P.M. PST)



Q & A

Please note, if you require a written response to a question, it must be submitted per RFP guidelines.



ADMINISTRATIVE OFFICE
OF THE COURTS