Request for Information

REGARDING: Live Chat

RFI-IT-2020-72-RB

RESPONSES DUE: September 18, 2020
3:00 P.M. (PDT)

JUDICIAL COUNCIL OF CALIFORNIA

ADMINISTRATIVE DIVISION

INFORMATION TECHNOLOGY

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1. **Introduction**

The Judicial Council of California (JCC), chaired by the Chief Justice of California, is the chief policy making agency of the California judicial system. The California Constitution directs the Judicial Council 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 Judicial Council also adopts rules for court administration, practice, and procedure, and performs other functions prescribed by law.

The Judicial Branch of California (Judicial Council), via its administrative office, seeks a Live Chat product that can allow Self-help website visitors to communicate with staff in real time.

Mission of the Program –

The Use of Intelligent Chat in California Courts
To improve public access to justice and to better serve current and future generations of Californians, the Judicial Branch of California uses intelligent chat technology to provide information and self-help services.

Vision –

"Enabling and providing access to court resources through the use of chat and chatbot technology."

2. **Current Situation**

Each day, hundreds of Californians form lines outside their county courts in order to research or seek information that will enable them to resolve a legal issue on their own, without the cost of an attorney. Many of the Californians visit the Self-help website to find out about the process, and information related to their case.

Rather than having to visit a court in-person, wait for office hours to be on hold with a court on the phone, wait for an email reply or spend time searching the web for answers, the website visitor should receive instant responses to their questions related to process, forms that needs to be filled or any other information by using chat technology

A. **Existing Chatbot**

The Judicial Council has developed a Chatbot to provide quick, conversational answers to the website visitor, saving them time and improving their overall experience The existing Chatbot is developed for the Ability to Pay tool (Chatbot link) currently deployed in 5 counties. We are looking to build on the platform to support other subject matter domains.

B. **Chatbot Features**

a. **User Interface**

    i) **Chatbot widget –** A widget includes the JCC logo icon with "Questions?" appearing in the bottom-right corner of the webpage. The user can initiate a chat session by clicking on this button.

    ii) **Most popular questions –** When the user clicks on the Most Popular questions button, the Chatbot displays the top 5 most popular model questions. Selecting a question will ask the question as if the user had typed it themselves in the chat feed.

    iii) **All Questions –** When the user clicks on the All Questions button, the Chatbot displays a list of all the model questions available. The user can also search through the list of questions. Selecting a question will ask the question as if the user had typed it themselves in the chat feed.

b. **Using Artificial Intelligence (AI) to understand a user's "Intent"**

Central to the usefulness of a Chatbot is for the user to say something to it conversationally and then receive a relevant response back. This is achieved technically by using Microsoft Cloud Natural Language AI services.

c. **Dynamic Suggestion**

User can receive up to three dynamically generated question suggestions in the chat. Clicking on this suggestion button automatically asks the Chatbot this question as if the user themselves had typed it themselves in the chat feed.

d. **User Feedback**

User has the ability to provide feedback on how the Chatbot is performing.

e. **Multiple Languages**

The current Chatbot supports English and Spanish languages.

C. Admin Portal

Admin portal is used to train the Chatbot's knowledgebase. The Admin Portal user has the ability to add and manage intents and utterances of the Chatbot knowledgebase. Intents are the purpose or goal expressed in a user's utterances. Utterances are input from the user that are interpreted by the Chatbot. The Admin Portal provides various analytics dashboards and trending reports to help with improving the performance of the Chatbot.

D. Existing Chatbot Architecture
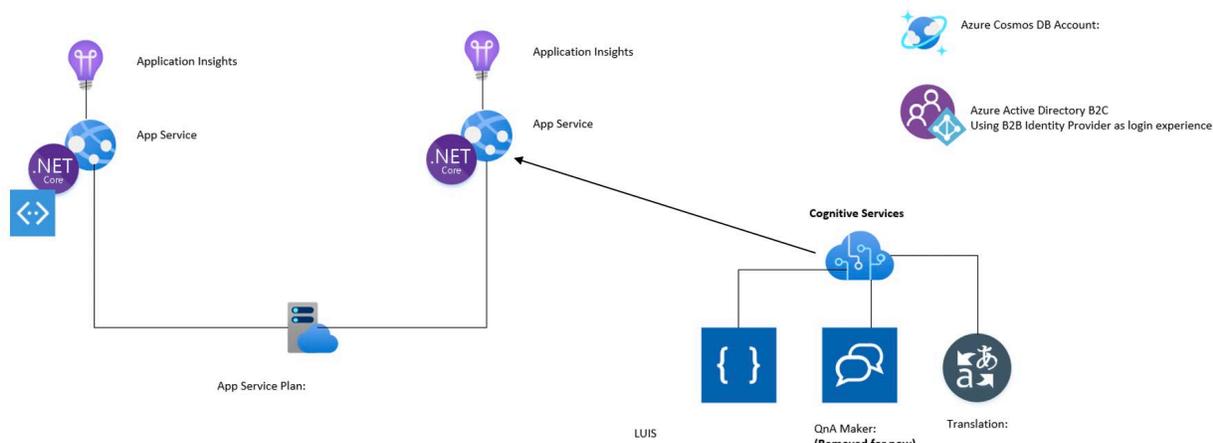
3. <u>Live Chat</u>

This Request for Information (RFI) seeks to identify entities and institutions that can partner with the branch and revolutionize the self-help service landscape through chat technology for those who choose to represent themselves in court.

The envisioned live chat product will enable the visitor to have real-time conversations with an available human agent and Subject Matter Expert (SME) while they're on the website. The live chat product should have the capability and APIs available to integrate with the existing Chatbot built on Microsoft Azure Bot service and Framework. All the chats would go to the Chatbot first and when the questions get a bit more complex, we would want the chatbot to easily hand over the conversation to the SME, ensuring a great experience for our website visitor. The JCC envisions to add multiple subject matter domains, agents, and to seamlessly hand-off chat conversations to various courts across jurisdictions over time.

The live chat requirements cover multiple business and technical requirements, including but not limited to:

1. End user
    a. Chat with Live Agent
2. System
    a. Chat routing
    b. Integration with existing Chatbot
    c. Security
3. Agent Portal
    a. Chat section
    b. Chat feed
    c. End user details

           d. Archive
           e. Visitor list
           f. Shortcut response
           g. Chat tags
           h. Ticketing system
           i. Agent setting
           j. Reporting

4. Admin Portal
           a. Admin settings
           b. Reporting and dashboard
5. Security

We are looking for new tools and technology to help us meet the business needs and features described in Appendix 1, Business/Technical Requirements. Responses should follow the compliance requirements and guidelines provided in Appendix 1, Business/Technical Requirements.

4. Information Requested

The California Judicial Branch is interested in the overall product features of a live chat product. At this time, we are most interested in learning about what capabilities and approaches exist in the marketplace, and the general costs associated with those capabilities. Note that estimated costs are for Judicial Council planning and information gathering only. This information will be relevant in the formulation of our subsequent solicitation in the form of a Request for Offer.

The Judicial Council requests that Proposers use the Proposer Response Template and Appendix 1, Business/Technical Requirements to submit their current solution and cost information.

Respondents are required to respond to the following questions using the Proposer Response Template:

1. Can you provide a demo of your product to our team?
2. Microsoft Azure Bot services integration with live chat -
    2.1 Does your live chat product have the ability to connect to our existing Microsoft Azure Bot?
    2.2 Please describe how your product integrates with Microsoft Azure Chatbot? Please include any physical and/or conceptual diagrams.
    2.3 Is Microsoft Azure Chatbot assigned a seat when integrated with your live chat product?
    2.4 What are the limitations of integrating your live chat product with Microsoft Bot services?
    2.5 Can we integrate our identity management (MS Azure AD) with your live chat product? If yes, how does that impact pricing?

3. Do you have a list of certified integrators who can help us with integration services? If yes, please provide the list of your certified partners.
4. Do you have the California Multiple Awards Schedules (CMAS) or Software Licensing Program (SLP) resellers list? If yes, please provide the list of your official resellers.
5. Do you have a knowledge base management tool, and if so, can that be integrated with live chat and chatbot? If yes, how does that impact pricing?
6. Is chat data stored in the US?

5. Timeline for this RFI

The JCC has developed the following list of key events related to this RFI. All dates are subject to change at the discretion of the JCC. An addendum will be issued should any changes become necessary.

Event	Date
RFI issued	September 04, 2020
Deadline for questions. (Submit to Solicitations@jud.ca.gov)	September 09, 2020 due by 12:00 P.M. (PT)
Questions and answers posted *(estimate only) (posted to the Courts website https://www.courts.ca.gov/rfps.htm)*	September 15, 2020
Last date and time information response package may be submitted (Submit to Solicitations@jud.ca.gov)	September 18, 2020 due by 3:00 P.M. (PT)

6. How to Submit Your Response

A. Submittal Information

All submissions are due by **3:00 p.m. (PDT) on September 18, 2020.** All interested parties should submit an electronic version of the entire response marked "Response to RFI # IT-2020-72-RB:

Judicial Council of California
Attn: Bid Desk, Procurement/Admin Div.
455 Golden Gate Avenue, 6th Floor
San Francisco, CA 94102-3688

Submissions should be transmitted by email to the solicitations mailbox at Solicitations@jud.ca.gov ("Solicitations Mailbox") The RFI number must be included in the subject line of any communication.

B. Response Format and Content

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

#	Attachment Title	Description
1	Proposer Response Template	Proposer's Response
2	Business/Technical Requirements	Functional and Non-functional Requirements

7. Information Exchange

After the Judicial Council staff 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 of California will not reimburse you for any expenses, travel and/or time etc., regarding information exchange activities.

8. Disposition of Materials and Confidential or Proprietary Information

All materials submitted in response to this RFI will become the property of the Judicial Council of California and will be subject to disclosure pursuant to applicable provisions of the California Public Contract Code and rule 10.500 of the California Rules of Court. Information that is submitted will be disclosed in response to applicable public records requests. Such disclosure will be made regardless of whether the submittal (or portions thereof) is marked "confidential," "proprietary," or otherwise, and regardless of any statement in the submittal (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 vendor prior to the disclosure of the submittal (or portions thereof). Any submittal that is password protected, or contains portions that are password protected, cannot be accepted or considered. Companies are accordingly cautioned not to include confidential, proprietary, or privileged information in the submittal.

9. Disclaimer

This RFI is issued for judicial branch information and planning purposes only and does not constitute a solicitation. Responses to the RFI will not be returned. A response to this notice will not be considered an offer and cannot be accepted by the Judicial Council of California to form a binding contract.   Responders are solely responsible for all expenses associated with responding to this RFI