

REQUEST FOR PROPOSALS

**JUDICIAL BRANCH TYLER ODYSSEY INTEGRATION
SERVICE**

RFP IT-2021-94B

PROPOSALS DUE:

June 30, 2021 NO LATER THAN *1* P.M. PACIFIC TIME

1.0 BACKGROUND INFORMATION

1.1 California (“Judicial Council” or “JCC”), chaired by the Chief Justice of California, is the chief policy making body of the California judicial system. The California Constitution directs the 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 council also adopts rules for court administration, practice, and procedure, and performs other functions prescribed by law. The Judicial Council is the staff agency for the council and assists both the council and its chair in performing their duties.

The Judicial Council of California (“JCC”) is seeking software development services to send data from the Tyler Odyssey CMS to the JCC Data warehouse via a set of RESTful interfaces which will be consumed by the JCC ETL tool (Talend) and feed into the JCC data warehouse for pretrial and Judicial Branch Statistical Information System (JBSIS)

The selected Proposer will develop the necessary RESTful interfaces (APIs) to meet the JCC requirements, and to provide and maintain operational support through the end of the contract.

2.0 DESCRIPTION OF SERVICES

2.1 Scope:

The scope of the RFP includes developing RESTful interfaces, maintenance and support of the interfaces including training the JCC team.

The selected Proposer will develop RESTful interfaces that meet JCC functional and technical requirements. Below are the key scope areas

- Develop a RESTful webservice interfaces that will allow retrieval of case information supporting the Pretrial, JBSIS Family Law and JBSIS Criminal cases. The RESTful interfaces shall leverage Tyler's OpenAPIs when possible. If the Tyler OpenAPIs are not available, develop components to fetch data directly from the Case Management System.
- Follow the JCC defined Project methodology (project Initiation to Deployment) to manage the project activities.
- Develop a repeatable process to deploy the services to future courts and provide operation support throughout the life of the contract period.
- Provide defined deliverables at each stage of the project.

2.2 Requirements:

The proposer to meet the JCC defined requirements as outlined below.

The developed solution will push entity change information in real time from the Tyler Odyssey CMS into Azure data lake.

A reconciliation process will be developed to run 'on demand' or 'at timed intervals' to reconcile case change information that is in Odyssey with what is in the Azure Data Lake Storage. This will be a fail-safe option in case there is a failure in Odyssey's real time publishing architecture. Implement RESTful endpoints that the JCC will deliver relevant case and person/party information from the Tyler Odyssey CMS. Direct database access via tables or views is expected to achieve this.

The JCC seeks the selected proposer with expertise developing RESTful web services for the purpose of integration.

- Implement RESTful endpoints that the JCC will consume in order to retrieve relevant case and person/party information from the Tyler Odyssey CMS.
- Develop the RESTful interfaces using Tyler OpenAPIs when applicable and if not develop an interface to fetch the data directly from the Tyler Case Management System
- Develop web services APIs to enable the branch wide data warehouse to request information on demand.
- Information retrieved from case management systems must comply with JCC-defined data dictionary.
- Develop process to automate delivery on configurable periodic basis, preferably an API driven approach.
- The RESTful service must be developed in .NET core (C#).
- The developed RESTful services need to meet the JCC defined performance needs (to be finalized during Design stage).
- Source code and database scripts must be provided at each milestone. Source codes to be maintained at JCC code repository.
- Data integration into the Azure Data Lake Storage (ADLS) to be automated and loaded into specified court ADLS folder.

2.3 Implementation:

The selected Proposer will implement the Tyler Odyssey Interface service solution within the timeframes specified in the participation agreement. The selected Proposer will provide the Tasks and Deliverables of each phase, as outlined below.

All documentation listed on the deliverables for each phase is due no later than two weeks after the end date of each phase, as set forth below:

A. Project Initiation

The Proposer project manager will be responsible for the Project Initiation Deliverables, end results, and for day-to-day project management. During this phase, high-level project planning will be conducted, individual roles and responsibilities will be defined, and a project kick-off meeting with project team members will be conducted. The initial project planning deliverables use to manage the project on an ongoing basis will be developed.

Deliverables:

- Project Scope and Charter
- Project Kickoff meeting
- Proposed high-level project schedule
- RAID (Risks, Actions, Issues and Dependencies) log
- Project communication plan
- Weekly status report

B. Assessment and Design Phase

The Proposer will conduct an assessment of JCC defined data dictionary and conduct the technical assessment of the Tyler Odyssey Open API to develop the interfaces to meet JCC needs. Develop the Target state architecture and detailed design document to implement the solution.

Deliverables:

- Solution architecture
- Detailed design document
- Key Milestones and Updated project schedule
- Updated RAID
- Target system and environment requirement document
- Test plan
- Weekly status report

C. Implementation and Test Phase

The Proposer will implement the JCC approved solution and conduct the various testing (SIT, E2E and support UAT) to validate the developed solution including working with JCC and court IT team.

Deliverables:

- Updated design document
- Run book / System troubleshooting guide
- Test cases and scripts
- UAT plan
- Test summary document
- Go-live readiness plan
- Stabilization plan
- Operational readiness checklist
- Webservice for Pretrial
- Webservice for JBSIS Family Law
- Webservice for JBSIS Criminal Case types
- Weekly status report

D. Deployment and Stabilization

The Proposer will deploy the solution in JCC identified courts and provide stabilization support.

Deliverables:

- Deployment plan
- Updated Go-live readiness plan
- Test closure memo
- Updated Stabilization plan
- Training and Knowledge transfer plan
- Lessons Learned document
- Operation maintenance support plan
- Deploy the webservices in Tyler pilot court #1
- Confirm repeatable deployment process with Tyler pilot court #2
- Weekly status report

E. Operation Maintenance and Support

The Proposer will provide the maintenance support throughout the timeframe of the contract and provide the necessary training / knowledge transfer to JCC / Court team. The JCC IT team will be shadowing the Proposer team during this period.

Deliverables:

- Code walk-through and handover
- Knowledge transfer and training
- Updated Run book and troubleshooting guide
- Operation maintenance support plan
- Project closure document
- Weekly Status Report

3.0 TIMELINE FOR THIS RFP

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

EVENT	DATE
RFP issued	May 26, 2021
Deadline for questions	June 4, 2021, 1PM PST
Questions and answers posted (<i>estimate only</i>)	June 9, 2021
Latest date and time proposal may be submitted	June 30, 2021, 1PM PST
Anticipated interview dates (<i>estimate only</i>)	July 5 to 9, 2021
Evaluation of technical proposals (<i>estimate only</i>)	July 12 to 23, 2021
Public opening of cost portion of proposals Details to be posted on the courts' website	July 28, 2021
Notice of Intent to Award (<i>estimate only</i>)	August 4, 2021
Negotiations and execution of contract (<i>estimate only</i>)	August 11 to 31, 2021
Contract start date (<i>estimate only</i>)	September 1, 2021
Contract end date (<i>estimate only</i>)	August 31, 2022

4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (IT Services)	These rules govern this solicitation.
Attachment 2: JCC Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must sign this JCC Standard Form agreement
Attachment 3: Proposer’s Acceptance of Terms and Conditions	On this form, the Proposer must indicate acceptance of the Terms and Conditions including those in Attachment 2 or identify exceptions to the Terms and Conditions. Note: A material exception to a Minimum Term will render a proposal non-responsive.
Attachment 4: General Certifications Form	The Proposer must complete the General Certifications Form and submit the completed form with its proposal.
Attachment 5: Small Business Declaration	The Proposer must complete this form only if it wishes to claim the small business preference associated with this solicitation.
Attachment 6: Payee Data Record Form	This form contains information the JCC requires in order to process payments and must be submitted with the proposal.
Attachment 8: Unruh and FEHA Certification	The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification.
Attachment 9: Darfur Contracting Act Certification	The Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.
Attachment 10: Bidder Declaration	The Proposer must complete and submit with the proposal the Bidder Declaration
Attachment 11: DVBE Declaration	The Proposer must complete the DVBE Certification and submit the completed certification with its proposal.
Exhibit A: Cost Worksheet	The Proposer must complete the Cost Worksheet
Exhibit B: Data Dictionary	The Data dictionary contains all the data elements that must be delivered in Proposer API code

5.0 PAYMENT INFORMATION

The Payment will be based on agreed upon Milestone deliverables for each stage of the project. The JCC will retention the last milestone payment until all the deliverables are completed as per the JCC satisfaction.

The JCC may only reimburse travel and per diem expense according to the State travel time and per diem rules for state employees.

6.0 SUBMISSIONS OF PROPOSALS

6.1 Proposals should provide straightforward, concise information that satisfies the requirements of the “Proposal Contents” section below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the RFP’s instructions and requirements, and completeness and clarity of content.

6.2 The Proposer must submit its proposal in two parts, the non-cost portion, and the cost portion.

6.3 Proposals must be delivered via email by the date and time listed on the coversheet of this RFP to:

Technical Proposal – solicitations@jud.ca.gov
Cost Proposal - RFP-IT-2021-94RB-COSTS@jud.ca.gov

6.4 Late proposals will not be accepted.

7.0 PROPOSAL CONTENTS

7.1 Non-Cost Portion. The following information must be included in the non-cost portion of the proposal. A proposal lacking any of the following information may be deemed non-responsive.

a. The Proposer’s name, address, telephone and fax numbers, and federal tax identification number. Note that if the Proposer is a sole proprietor using his or her social security number, the social security number will be required before finalizing a contract.

b. Name, title, address, telephone number, and email address of the individual who will act as the Proposer’s designated representative for purposes of this RFP.

- c. Names, addresses, and telephone numbers of a minimum of 3 clients for whom the Proposer has conducted similar services. The JCC may check references listed by the Proposer.
- d. Proposed method and timeframe to complete the work.
- e. Acceptance of the Terms and Conditions.
 - i. On Attachment 3, the Proposer must check the appropriate box and sign the form. If the Proposer marks the second box, it must provide the required additional materials. An “exception” includes any addition, deletion, or other modification.
 - ii. If exceptions are identified, the Proposer must also submit (a) a red-lined version of the Terms and Conditions that implements all proposed changes, and (b) a written explanation or rationale for each exception and/or proposed change.
 - iii. **Note: A material exception to a Minimum Term will render a proposal non-responsive.**
- f. Certifications, Attachments, and other requirements.
 - i. The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.
 - ii. If Contractor is a California corporation, limited liability company (“LLC”), limited partnership (“LP”), or limited liability partnership (“LLP”), proof that Contractor is in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor conducts or will conduct (if awarded the contract) intrastate business in California, proof that Contractor is qualified to do business and in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor does not (and will not if awarded the contract) conduct intrastate business in California, proof that Contractor is in good standing in its home jurisdiction.
 - iii. Copies of the Proposer’s (and any subcontractors’) current business licenses, professional certifications, or other credentials.
 - iv. Proof of financial solvency or stability (e.g., balance sheets and income statements).
 - v. The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification (Attachment 8) and submit the completed certification with its bid.

- vi. The Proposer must complete the Darfur Contracting Act Certification (Attachment 9) and submit the completed certification with its proposal

7.2 Cost Portion. The following information must be included in the cost portion of the proposal.

IT Services:

- i. A detailed line-item budget showing total cost of the proposed services.
- ii. A full explanation of all budget line items in a narrative entitled “Budget Justification.”
- iii. A “not to exceed” total for all work and expenses payable under the contract, if awarded.

(Refer to Exhibit A: Cost Table Worksheet for details)

NOTE: It is unlawful for any person engaged in business within this state to sell or use any article or product as a “loss leader” as defined in Section 17030 of the Business and Professions Code.

8.0 OFFER PERIOD

A Proposer's proposal is an irrevocable offer for ninety (90) days following the proposal due date. In the event a final contract has not been awarded within this period, the JCC reserves the right to negotiate extensions to this period.

9.0 EVALUATION OF PROPOSALS

The cost portion of proposals will be publicly opened at the date and time noted in Section 3.0 in accordance to the details of a notice to be posted on the court website prior to the date of cost opening.

The JCC will evaluate the proposals on a 100-point scale using the criteria set forth in the table below. Award, if made, will be to the highest-scored proposal.

If a contract will be awarded, the JCC will post an intent to award notice at www.courts.ca.gov.

CRITERION	MAXIMUM NUMBER OF POINTS
Quality of work plan submitted	20
Experience on similar assignments	10
Cost	50
Credentials of staff to be assigned to the project	4
Acceptance of the Terms and Conditions	7
Ability to meet timing requirements to complete the project	6
DVDE	3

10.0 INTERVIEWS

The JCC *may* conduct interviews with Proposers to clarify aspects set forth in their proposals or to assist in finalizing the ranking of top-ranked proposals. The interview process may require a demonstration. The interview may also require a demonstration of equivalence if a brand name is included in the specifications. The interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the JCC’s offices. The JCC will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The JCC will notify eligible Proposers regarding interview arrangements.

11.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

PROPOSALS 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 JCC will not disclose (i) social security numbers, or (ii) balance sheets or income statements submitted by a Proposer that is not a publicly traded corporation. All other information in proposals will be disclosed in response to applicable public records requests. Such disclosure will be made regardless of whether the proposal (or portions thereof) is marked “confidential,” “proprietary,” or otherwise, and regardless of any statement in the proposal (a) purporting to limit the JCC’s right to disclose information in the proposal, or (b) requiring the JCC to inform or obtain the consent of the Proposer prior to the disclosure of the proposal (or portions thereof). Any proposal that is password protected, or contains portions that are

password protected, may be rejected. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

12.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE

Qualification for the DVBE incentive is not mandatory. Failure to qualify for the DVBE incentive will not render a proposal non-responsive.

Eligibility for and application of the DVBE incentive is governed by the JCC's DVBE Rules and Procedures. Proposer will receive a DVBE incentive if, in the JCC's sole determination, Proposer has met all applicable requirements. If Proposer receives the DVBE incentive, a number of points will be added to the score assigned to Proposer's proposal. The number of points that will be added is specified in Section 10.0 above.

To receive the DVBE incentive, at least 3% of the contract services must be provided by a DVBE performing a commercially useful function. Or, for solicitations of IT services, Proposer may have an approved Business Utilization Plan ("BUP") on file with the California Department of General Services ("DGS").

If Proposer wishes to seek the DVBE incentive:

1. Proposer must complete and submit with its proposal the Bidder Declaration (Attachment 10). Proposer must submit with the Bidder Declaration all materials required in the Bidder Declaration.
2. Proposer must submit with its proposal a DVBE Declaration (Attachment 11) completed and signed by each DVBE that will provide services in connection with the contract. If Proposer is itself a DVBE, it must complete and sign the DVBE Declaration. If Proposer will use DVBE subcontractors, each DVBE subcontractor must complete and sign a DVBE Declaration. **NOTE:** The DVBE Declaration is not required if Proposer will qualify for the DVBE incentive using a BUP on file with DGS.

Failure to complete and submit these forms as required will result in Proposer not receiving the DVBE incentive. In addition, the JCC may request additional written clarifying information. Failure to provide this information as requested will result in Proposer not receiving the DVBE incentive.

If this solicitation is for IT services, the application of the DVBE incentive may be affected by application of the small business preference. For additional information, see the JCC's Small Business Preference Procedures for the Procurement of Information Technology Services.

If Proposer receives the DVBE incentive: (i) Proposer will be required to complete a post-contract DVBE certification if DVBE subcontractors are used; (ii) Proposer must use any DVBE subcontractor(s) identified in its proposal unless the JCC approves in writing the

substitution of another DVBE; and (iii) failure to meet the DVBE commitment set forth in its proposal will constitute a breach of contract.

FRAUDULENT MISREPRETATION IN CONNECTION WITH THE DVBE INCENTIVE IS A MISDEMEANOR AND IS PUNISHABLE BY IMPRISONMENT OR FINE, AND VIOLATORS ARE LIABLE FOR CIVIL PENALTIES. SEE MVC 999.9.

13.0 SMALL BUSINESS PREFERENCE

Small business participation is not mandatory. Failure to qualify for the small business preference will not render a proposal non-responsive.

Eligibility for and application of the small business preference is governed by the JCC's Small Business Preference Procedures for the Procurement of Information Technology Services. The Proposer will receive a small business preference if, in the JCC's sole determination, the Proposer has met all applicable requirements. If the Proposer receives the small business preference, the score assigned to its proposal will be increased by an amount equal to 5% of the points assigned to the highest scored proposal. If a DVBE incentive is also offered in connection with this solicitation, additional rules regarding the interaction between the small business preference and the DVBE incentive apply.

To receive the small business preference, the Proposer must be either (i) a Department of General Services ("DGS") certified small business or microbusiness performing a commercially useful function, or (ii) a DGS-certified small business nonprofit veteran service agency.

If the Proposer wishes to seek the small business preference, the Proposer must complete and submit with its proposal the Small Business Declaration (Attachment 5). The Proposer must submit with the Small Business Declaration all materials required in the Small Business Declaration.

Failure to complete and submit the Small Business Declaration as required will result in the Proposer not receiving the small business preference. In addition, the JCC may request additional written clarifying information. Failure to provide this information as requested will result in the Proposer not receiving the small business preference.

If the Proposer receives the small business preference, (i) the Proposer will be required to complete a post-contract report; and (ii) failure to meet the small business commitment set forth in its proposal will constitute a breach of contract.

FRAUDULENT MISREPRESENTATION IN CONNECTION WITH THE SMALL BUSINESS PREFERNCE IS UNLAWFUL AND IS PUNISHABLE BY CIVIL PENALTIES. SEE GOVERNMENT CODE SECTION 14842.5.

14.0 PROTESTS

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contracting Manual (see www.courts.ca.gov/documents/jbcl-manual.pdf). Failure of a Proposer to comply with the protest procedures set forth in that chapter will render a protest inadequate and non-responsive and will result in rejection of the protest. The deadline for the JCC to receive a solicitation specifications protest is **June 4, 2021**. Protests must be sent to:

The Protest Officer/Contracts Manager
Branch Accounting and Procurement | Administrative Division
Judicial Council of California
455 Golden Gate Ave., San Francisco, CA 94102-3688

Exhibit A

Cost Worksheet

Judicial Branch Tyler Odyssey Integration Service

The proposer shall furnish all labor, materials, and equipment necessary to perform the Project in accordance with the specifications described in section 2.0 Description of Services, at the all-inclusive rates. Payment for deliverables completed under this Agreement, not to exceed the Agreement Amount, shall be by Project phase using the not to exceed (“NTE”) percentage assigned for each phase.

Submission of this information is mandatory

Deliverables	Hours Not to Exceed	Hourly Rate	Cost Not to Exceed
1. Project Initiation and Planning Phase – (NTE 10% of Project Total)			
a. Project Scope and Charter			
b. Project Kickoff Meeting			
c. Project High-Level Schedule			
d. Project Communication Plan			
e. Initial RAID (Risks, Actions, Issues, and Dependencies) Log			
f. Weekly Status Report			
Total Initiation and Planning Phase Costs Not to Exceed 10% of Total Project Costs			
2. Assessment and Design Phase – (NTE 15% of Project Total)			
a. Solution Architecture			
b. Detailed Design Document			
c. Updated Project Schedule			
d. Update RAID Log			
e. Target System and Environment Requirement Document			
f. Test Plan			
g. Weekly Status Report			
Total Assessment and Design Phase Costs Not to Exceed 15% of Total Project Costs			
3. Implementation and Testing Phase – (NTE 40 % of Project Total)			
a. Updated Design Document			
b. Run Book/System Troubleshooting Guide			
c. Test Cases and Test Scripts			
d. UAT Plan			
e. Go-Live Readiness Plan			
f. Stabilization Plan			
g. Operational Readiness Checklist			

h. Pretrial Web Service			
i. JBSIS Family Law Case Type Web Service			
j. JBSIS Criminal Case Type Web Service			
k. Updated Project Schedule			
l. Weekly Status Report			
Total Implementation and Testing Phase Costs Not to Exceed 40% of Total Project Costs			
4. Deployment and Stabilization – (NTE 20% of Project Total)			
a. Deployment Plan			
b. Updated Go-Live Readiness Plan			
c. Test Closure Memo			
d. Updated Stabilization Plan			
e. Training and Knowledge Transfer Plan			
f. Operation Maintenance Support Plan			
g. Updated RAID Log			
h. Lessons Learned Document			
i. Deploy Solution: Tyler Pilot Court #1			
j. Confirm Repeatable Deployment Process with Tyler Pilot Court #2			
k. Weekly Status Report			
Total Deployment and Stabilization Phase Costs Not to Exceed 20% of Total Project Costs			
5. Operation Maintenance and Support – (NTE 15% of the Project Total)			
a. Code Walk-Through and Handover			
b. Knowledge Transfer and Training			
c. Updated Run Book and Troubleshooting Guide			
d. Operation Maintenance Support Plan			
e. Project Closure Document			
f. Weekly Status Report			
Total Operation Maintenance and Support Phase Costs Not to Exceed 15% of Total Project Costs			

Exhibit B

Data Dictionary



DataDictionary_Sub
mission_V1.7.xlsx