



# **REQUEST FOR PROPOSAL**

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**JUDICIAL COUNCIL OF CALIFORNIA**

**TITLE:  
MASTER CALENDAR SCHEDULING  
SYSTEM**

**RFP NUMBER: LSS-2019-18-CD**

**PROPOSALS DUE: MARCH 12, 2020  
NO LATER THAN 3:00 P.M.  
(PACIFIC TIME)**

## 1.0 BACKGROUND INFORMATION

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

1.2 As an internal services organization within the JCC, the Conference Center & Reception Services Unit (located within the office of Conference & Print Production) is tasked with administering the operation of a single master calendar that highlights events and their audiences that are important to the judicial branch.

## 2.0 DESCRIPTION OF GOODS AND/OR SERVICES

**2.1 Purpose:** The JCC seeks to identify and retain a qualified entity with expertise in providing a cloud-based, (web portal) master calendar scheduling system. An off the shelf product is desired with minimal customization if necessary.

### 2.2 Definition of Users

- a. Administrators review, edit, approve, and post submissions of events.

In addition, Administrators also manage and maintain the following application components:

- “Look and feel” screens, including tabs, input fields, and labels
  - Selection fields by role
  - Pick lists / drop-down forms and menus (e.g. for event types, audience)
  - Configuration of notification generation
  - Security role and permission management
- b. Requestors are users submitting their event for inclusion on the Master Calendar
  - c. End Users are general users viewing the Master Calendar for event information.

### 2.3 Functional Requirements

Table 1: “M” Must Have; “D” Desirable

	(M)/(D)	Able to Provide Yes or No	Explanation
<b><i>Requestor Functionality</i></b>			
System shall provide all parties (Requestors, Administrators and End Users) with the ability to view all events by day, week, and month as a calendar grid.	<b>M</b>		
System shall have an intuitive and easy-to-use fillable form-based process for Requestors.	<b>M</b>		
The system’s form shall provide Requestors with the ability to request a Master Calendar entry. Requestors shall have ability to specify:	<b>M</b>		
Event name	<b>M</b>		
Event date and time	<b>M</b>		
Purpose of event (fillable field)	<b>D</b>		
Event location	<b>M</b>		
Event type (from approx. 12 selections)	<b>M</b>		
Number of attendees	<b>M</b>		
Event website	<b>M</b>		
Audience information by group (from approx. 75 selections)	<b>M</b>		
Program manager contact information	<b>M</b>		
Ability to designate calendar entry as internal (intranet) or external (website) posting/view.	<b>D</b>		
System shall provide Requestors with the ability to search a date-range given a set of criteria (e.g. event name or event type).	<b>D</b>		

<b><i>Administrator Functionality</i></b>			
System shall queue Requestors' pending submissions so that the Administrator may edit and/or approve an entry or deny the request.	<b>M</b>		
System shall track all entries and all changes to the request by Administrator.	<b>D</b>		
System shall provide Administrators with the ability to edit and delete calendar entries.	<b>M</b>		
System shall provide Administrators with the ability to archive calendar entries.			
System shall provide Administrators the ability to add, delete, and delegate users' access level.	<b>M</b>		
System shall allow Administrators the ability to edit the event request form (e.g. add, delete or edit fields).	<b>M</b>		
<b><i>End User Functionality</i></b>			
System shall provide End Users with the ability to search a date-range given a set of criteria (e.g. event name, type or audience).	<b>M</b>		
System shall provide the ability for End Users to filter their calendar view (e.g. by location, event type, audience).	<b>M</b>		
<b><i>Notifications</i></b>			
System shall have the ability to automatically generate and send Requestors' meeting confirmation notice.	<b>M</b>		
<b><i>Workflow Management</i></b>			
System shall not post an event until/unless a request has been approved and confirmed.	<b>M</b>		
<b><i>Administration &amp; Security</i></b>			
System shall provide a single website.	<b>M</b>		
System shall have the ability to set user privileges by group.	<b>M</b>		

System shall have the ability to create varying access levels and views by role or designation.	<b>M</b>		
System shall allow separate unique calendar interfaces (e.g. internal calendar view of corresponding events and external calendar view of corresponding events).	<b>M</b>		
<b>Reporting Functionality</b>			
System shall provide Administrators the ability to build custom reports of all meeting entries and event data.	<b>M</b>		
<b>Additional Functionality</b>			
System shall have the ability to export the data in a format that can be easily integrated into other applications (e.g. export a mirror image of the calendar to another website or intranet).	<b>M</b>		
System shall provide ability to filter/display calendar information according to audience (public view, intranet view, etc).	<b>M</b>		
The ability to migrate current and/or historical data into new system.	<b>D</b>		

## 2.4 Technical Specifications

Table 2:

Must be able to support all major common browsers (e.g. 11/Edge, Chrome, FireFox, and Safari).	<b>M</b>		
Highly responsive customer/technical support, including a formal performance-based service level agreement that defines standards for service delivery. Customer services hours should extend past normal business hours.	<b>M</b>		
Solution maintenance and version management. Please describe your version management and solution maintenance processes.	<b>M</b>		

Notification shall be provided of minor or major system downtime.	<b>M</b>		
Solution has on-line training and support materials available to users, developers, and administrators.	<b>D</b>		
ADA compliant	<b>M</b>		
User/admin log-ons are recorded and logs retained for specified period.	<b>D</b>		
If using a SQL backend, describe measures protecting against SQL injection attacks.	<b>D</b>		
Describe process of bounds checking (can't overflow the size of the array).	<b>D</b>		
Describe your routine application and OS vulnerability assessments.	<b>D</b>		
Apply vendor patches within specified period after they are made available	<b>D</b>		
Indicate protection against cross-site scripting attacks.	<b>D</b>		
Must be able to store historical data for a minimum of five (5) years.	<b>D</b>		

**2.5 Additional Features/Functionality**

Table 3:

Proposer may list additional features and/or functionality your organization can provide that may further improve the Master Calendar Scheduling System that are not listed in the above tables. You may add additional lines to the table as needed.


**3.0 TIMELINE FOR THIS RFP**

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

EVENT	DATE
RFP issued	<b>February 25, 2020</b>
Deadline for questions <a href="mailto:Solicitations@jud.ca.gov">Solicitations@jud.ca.gov</a>	<b>March 3, 2020 by 3:00 P.M. (Pacific Time)</b>
Questions and answers posted (estimate only) <a href="http://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a>	<b>March 5, 2020</b>
Latest date and time proposal may be submitted	<b>March 12, 2020 by 3:00 P.M. (Pacific Time)</b>
Anticipated Product Demonstration dates, (if required) (estimate only)	<b>March 16-20, 2020</b>
Evaluation of Technical proposals (estimate only)	<b>March 23-27, 2020</b>
Technical proposals scores posted at (estimate only) <a href="http://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a>	<b>March 30, 2020</b>
Public opening of cost portion of proposals Notice of time and location will be posted at <a href="http://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a> (estimate only)	<b>April 3, 2020 at 10 A.M. Pacific Time</b>
Notice of Intent to Award (estimate only) <a href="http://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a>	<b>April 8, 2020</b>
Negotiations and execution of contract (estimate only)	<b>April 13 – 17, 2020</b>
Contract start date (estimate only)	<b>June 1, 2020</b>
Contract end date (estimate only)	<b>May 31, 2023</b>

#### 4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (IT Goods and Services)	These rules govern this solicitation.
Attachment 2: Standard Agreement	If selected, the person or entity submitting a proposal (the “Proposer”) must sign a JBE Standard Form agreement containing these terms and conditions (the “Terms and Conditions”).
Attachment 3: Proposer’s Acceptance of Terms and Conditions	On this form, the Proposer must indicate acceptance of the Terms and Conditions or identify exceptions to the Terms and Conditions.
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	Complete and return 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 JBE requires in order to process payments and must be submitted with the proposal.
Attachment 7: Reference Form	The Proposer must complete and return this form with its proposal
Attachment 8: Bidder Declaration	The Proposer must complete this form only if wishes to claim the Disabled Veteran Business Enterprise (DVBE) incentive associated with this solicitation.
Attachment 9: DVBE Declaration	Each DVBE that will provide goods and/or services in connection with the contract must complete this form. If the Proposer is itself a DVBE, it must also complete and sign the DVBE Declaration.

## 5.0 PAYMENT INFORMATION

Payment will be based per the terms in Attachment 2, Purchase Order Terms and Conditions.

## 6.0 SERVICE TERM

The services specified in this RFP are expected to be performed by the selected Proposer for an initial three (3) year period commencing on or about June 1, 2020 (actual date is TBD), and ending May 31, 2023, with additional annual service renewals in one (1) year increments for a maximum of seven (7) option terms. Service renewals will be at the sole



discretion of the Judicial Council and will be exercised upon satisfactory performance during the preceding term.

## 7.0 SUBMISSIONS OF PROPOSALS

7.1 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.

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

a. The Proposer must submit **one (1) original and three (3) hard copies** of the non-cost portion of the proposal. The original must be signed by an authorized representative of the Proposer. The original non-cost portion of the proposal must be submitted to the JBE in a single sealed envelope, separate from the cost portion. The Proposer must write the RFP title and number on the outside of the sealed envelope.

b. The Proposer must submit **one (1) original and three (3) hard copies** of the cost portion of the proposal. The original must be signed by an authorized representative of the Proposer. The original cost portion of the proposal (and the copies thereof) must be submitted to the JBE in a single sealed envelope, separate from the non-cost portion. The Proposer must write the RFP title and number on the outside of the sealed envelope.

c. The Proposer must submit an electronic version of the entire proposal on CD-ROM or USB memory stick/flash drive. It is recommended that you have separate files for the non-cost and cost portions in the electronic version. The files must be in PDF, Word, or Excel formats.

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

Judicial Council of California  
Branch Accounting and Procurement | Administrative Division  
Attn: **Sheryl Berry, RFP: LSS-2019-18-CD**  
455 Golden Gate Avenue, 6th Floor  
San Francisco, CA 94102-3688

7.4 Late proposals will not be accepted.

- 7.5 Only written proposals will be accepted. Proposals must be sent by registered or certified mail, courier service (e.g. FedEx), or delivered by hand. Proposals may not be transmitted by fax or sent via email.

## 8.0 PROPOSAL CONTENTS

8.1 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. Model number(s), specifications, or other description of the software the Proposer proposes to supply to the JBE, including warranty information.
- d. A copy of Attachment 7, Reference Form with the names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Proposer has provided similar goods. The JBE may check references listed by the Proposer.
- e. Proposed method to complete the work, including the following:
  - i. A complete response for Tables 1 and 2 in Section 2.3 Functional Requirements and Section 2.4 Technical Specifications including Table 3 in Section 2.5 Additional Features/Functionality, if applicable.
  - ii. Describe the level of data security, backup and disaster recovery offered by your company to ensure the integrity of the calendar scheduling data.
  - iii. Please describe the process whereby the Judicial Council will be able to access stored data after the contract expires. Please include the process to move the stored data from one system to another system, especially in a situation whereby the data is transferred to another company.
  - iv. Provide copies of your company's terms and conditions for software licensing, maintenance and support specific to the proposed software.
- f. 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 (i) a red-lined version of the Terms and Conditions that implements all proposed changes, and (ii) a written explanation or rationale for each exception and/or proposed change.
- g. 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. Proposer must complete and submit the required attachments, as applicable as listed in Section 4.0

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

- i. Propose your licensing model and costs for the three (3) year initial term.
- ii. Propose your licensing model and costs each of the seven (7) one (1) year option term(s).
- iii. If applicable, propose the costs for stored data and any volume level(s) of storage offered.
- iv. If applicable, propose the costs for the Judicial Council to access stored data after the expiration period of the agreement.

- v. If applicable, propose the costs to transfer the Judicial Council’s data to another server website or Contractor.

**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.

**9.0 OFFER PERIOD**

A Proposer's proposal is an irrevocable offer for one-hundred-eighty (180) days following the proposal due date. In the event a final contract has not been awarded within this period, the JBE reserves the right to negotiate extensions to this period.

**10.0 EVALUATION OF PROPOSALS**

The cost portion of proposals will be publicly opened at the date and time noted in Section 3.0 at the Judicial Council of California in San Francisco, CA.

The Judicial Council 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 Judicial Council will post an intent to award notice at [www.courts.ca.gov/rfps.htm](http://www.courts.ca.gov/rfps.htm).

<b>CRITERION</b>	<b>MAXIMUM NUMBER OF POINTS</b>
Cost	50
Quality of proposal (Completeness and inclusion of required information in conformance with the RFP submission requirement in Section 7.0 and 8.0; and clarity of the proposal content)	5
Ability to provide the Functional Requirements and Technical Specifications in Sections 2.3 and 2.4	25

CRITERION	MAXIMUM NUMBER OF POINTS
Additional Features/Functionality offered	10
Acceptance of the Terms and Conditions	7
DVBE Incentive	3

**11.0 PRE-BID CONFERENCE AND INTERVIEWS FOR PRODUCT DEMONSTRATION**

11.1 An optional Pre-Bid Conference for all Proposers will be held at the time, date and place identified in Section 3.0, Timeline for this RFP. The Pre-Bid Conference shall be open to all interested parties for the purpose to illustrate how the current master calendar system is utilized in order to give Prospective Proposers a better understanding of the Judicial Council’s needs, a Question & Answer session will follow for technical questions. Attendance may be in person or via WebEx. Please arrive 15 minutes before the pre-bid conference and check-in at the security desk in the 1<sup>st</sup> floor lobby. All Prospective Proposers are strongly encouraged to attend. The Judicial Council will not reimburse Proposers for any costs incurred in traveling to or from the Pre-Bid conference location.

11.2 The Judicial Council 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 Judicial Council’s offices. The Judicial Council will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The Judicial Council will notify eligible Proposers regarding interview arrangements.

**12.0 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 Judicial Council 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 Judicial Council’s right to disclose information in the proposal, or (b) requiring the Judicial Council 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.

### **13.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE**

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

13.2 The Proposer will receive a DVBE incentive if, in the sole determination of the Council's staff, 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 as specified in section 10 above.

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

13.4 If Proposer wishes to seek the DVBE incentive:

- The Proposer must complete and submit with its proposal the Bidder Declaration (**Attachment 8**). The Proposer must submit with the Bidder Declaration all materials required in the Bidder Declaration.
- The Proposer must submit with its proposal a DVBE Declaration (**Attachment 9**) completed and signed by each DVBE that will provide goods and/or services in connection with the contract. If the Proposer is itself a DVBE, it must also complete and sign the DVBE Declaration (**Attachment 9**). If the 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.

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

13.6 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.**

#### **14.0 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 Judicial Council's Small Business Preference Procedures for the Procurement of Information Technology Goods and Services. The Proposer will receive a small business preference if, in the Judicial Council'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.

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 Judicial Council 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 MISREPRETATION IN CONNECTION WITH THE SMALL BUSINESS PREFERNCE IS UNLAWFUL AND IS PUNISHABLE BY CIVIL PENALTIES. SEE GOVERNMENT CODE SECTION 14842.5.**

#### **15.0 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](http://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

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protest inadequate and non-responsive and will result in rejection of the protest. The deadline for the Judicial Council to receive a solicitation specifications protest is Bid Closing Date.

The deadline for an award protest would be five (5) court days after the posting of the Notice of Intent to Award.

Protests must be sent to:

Judicial Council of California  
Branch Accounting and Procurement | Administrative Division  
ATTN: Protest Hearing Officer, RFP Number: LSS-2019-18-CD  
455 Golden Gate Avenue, 6<sup>th</sup> floor  
San Francisco, CA 94102-3688