



Judicial Council of California
ADMINISTRATIVE OFFICE OF THE COURTS

FINANCE DIVISION

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TO: **POTENTIAL PROPOSERS**

FROM: Administrative Office of the Courts
Information Services Division

DATE: **February 8, 2010**

SUBJECT/PURPOSE OF MEMO: **REQUEST FOR PROPOSALS**
Information Services Division (ISD), a division of the Administrative Office of the Courts, seeks the services of two consultants to provide technical analysis for branch-wide data center installations and court deployments.

ACTION REQUIRED: You are invited to review and respond to the attached Request for Proposals (RFP), as posted at <http://www.courtinfo.ca.gov/reference/rfp/>:
Project Title: **Consulting Technical Analysts**
RFP Number: **ISD-200905-RB**

QUESTIONS TO THE SOLICITATIONS MAILBOX: Questions regarding this RFP should be directed to solicitations@jud.ca.gov no later than **February 16, 2010**.

DATE AND TIME PROPOSAL DUE: There will not be a pre-proposal conference for this RFP.
Proposals must be received by **Friday, February 26, 2010, no later than 3 p.m. Pacific Time.**

SUBMISSION OF PROPOSAL: Proposals must be sent to:
Judicial Council of California
Administrative Office of the Courts
Attn: Nadine McFadden, RFP No. ISD-200905-RB
455 Golden Gate Avenue, 7th Floor
San Francisco, CA 94102-3688

JUDICIAL COUNCIL OF CALIFORNIA ADMINISTRATIVE OFFICE OF THE COURTS

1.0 GENERAL INFORMATION

1.1 BACKGROUND

1.1.1 The Judicial Council of California, chaired by the Chief Justice of California, is the chief policy making agency 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 Administrative Office of the Courts (AOC) is the staff agency for the Council and assists both the Council and its chair in performing their duties.

1.1.2 The Information Services Division (ISD), a division of the AOC, coordinates court technology statewide, and supports coordination throughout the judicial branch; manages centralized statewide technology projects; and optimizes the scope and accessibility of accurate statewide judicial information.

2.0 PURPOSE OF THIS REQUEST FOR PROPOSALS (RFP)

2.1 The AOC seeks the services of two (2) consultants from one or two firms to perform the tasks of Consulting Technical Analysts, for approximately 3 years. The initial contract term will be for one year, with the AOCs option to extend the contract for two additional consecutive one-year terms.

2.2 The expected contractual responsibilities and work requirements and equipment requirements are set forth in Exhibit D, Work to be Performed, in Attachment 2, Contract Terms.

3.0 TIMELINE FOR THIS RFP

3.1 The AOC has developed the following list of key events from the time of the issuance of this RFP through the intent to award contract. All dates are subject to change at the discretion of the AOC.

EVENT	KEY DATE
RFP issued	Monday, February 08, 2010
Deadline for questions to solicitations@jud.ca.gov	Tuesday, February 16, 2010

EVENT	KEY DATE
Posting of answers to questions	Friday, February 19, 2010
Latest date and time proposal may be submitted	Friday, February 26, 2010, 3:00 p.m. Pacific Time
Evaluation of proposals (<i>estimate only</i>)	Friday, February 26, 2010 through Thursday, March 18, 2010
Interview of top candidates (<i>estimate only</i>)	Friday, March 19, 2010 through Thursday, April 01, 2010
Notice of Intent to Award (<i>estimate only</i>)	Friday, April 02, 2010
Anticipated start date (<i>estimate only</i>)	Monday, April 19, 2010

4.0 RFP ATTACHMENTS

4.1 Included as part of this RFP are the following attachments:

- 4.1.1 Attachment 1, Administrative Rules Governing Request for Proposals. Proposers shall follow the rules, set forth in Attachment 1, in preparation and submittal of their proposals.
- 4.1.2 Attachment 2, Contract Terms. Contracts with successful firms will be signed by the parties on a State of California Standard Agreement form and will include terms appropriate for this project. Terms and conditions typical for the requested services are attached as Attachment 2, Contract Terms and include: Exhibit A, Standard Provisions; Exhibit B, Special Provisions; Exhibit C, Payment Provisions; Exhibit D, Work to be Performed; Exhibit E, Contractor’s Key Personnel (to be determined); and Exhibit F, Attachments.
- 4.1.3 Attachment 3, Vendor’s Acceptance of the RFP’s Contract Terms. Proposers must either indicate acceptance of Contract Terms, as set forth in Attachment 2, Contract Terms, or clearly identify exceptions to the Contract Terms, as set forth in this Attachment 3.
 - 4.1.3.1 If exceptions are identified, then proposers must also submit (i) a red-lined version of Attachment 2, Contract Terms, that clearly tracks proposed changes to this attachment, and (ii) written documentation to substantiate each such proposed change.
- 4.1.4 Attachment 4, Payee Data Record Form. The AOC is required to obtain and keep on file, a completed Payee Data Record for each vendor prior to entering into a contract with that vendor. Therefore, vendor’s proposal must include a completed and signed Payee Data Record Form, set forth as Attachment 4, or provide a copy of the form previously submitted to AOC.

5.0 CANDIDATE QUALIFICATIONS

The ideal candidate(s) will have the following experience and capabilities:

- 5.1 Minimum of 7 years experience in Information Technology.
- 5.2 Minimum of 5 years experience with network / application system deployment projects.
- 5.3 Experience in supporting a government or public body RFP process in technical aspects.
- 5.4 General computing knowledge of the following technologies:
 - 5.4.1 Networking – Routing Strategies, Switching Technologies, Cisco Platform
 - 5.4.2 PC applications
 - 5.4.3 Client / server applications – SAP, Tibco or similar data integration software
 - 5.4.4 Oracle database
 - 5.4.5 Firewall security
 - 5.4.6 Remote access technology – VPN, Terminal Services
 - 5.4.7 Telecommunications technology - Circuits
 - 5.4.8 Software development life cycle
 - 5.4.9 Encryption technology. – Cisco Platform IEEE Standards
- 5.5 Prior experience with tier 3 data center environments.
- 5.6 Possess knowledge of Enterprise Network Infrastructure design concepts.
- 5.7 Good working knowledge of security processes and datacenter technology infrastructure.
- 5.8 Experience working on multiple simultaneous IT & network projects through the entire lifecycle, including planning, estimation, execution, and closeout.
- 5.9 Competent in the use of Microsoft Visio, Project, and Power Point.
- 5.10 Excellent oral, written, analytical and communication skills with the ability to lead a technical discussion to both technical and non-technical staff.

6.0 EVALUATION OF PROPOSALS

- 6.1 Proposals must demonstrate the candidate's and consulting firm's overall capabilities and will be evaluated in the categories set forth in paragraphs 6.3, 6.4, 6.5, 6.6 and 6.7, below. Proposal's must include each referenced paragraph and sub-paragraph number in sequence and the consultant's demonstration of meeting the requirement set forth in each paragraph and sub-paragraph.

6.2 Top scoring candidates will be interviewed to determine the candidates oral and communications skills. Following the interviews, the AOC will finalize scores for those interviewed. If a proposal includes multiple candidates, each proposed candidate will be evaluated separately in accordance with these criteria. The maximum total available score for all categories combined will be 100 points per proposed candidate. Although some categories are weighted more than others, all are considered necessary, and a proposal must be technically acceptable in each area to be eligible for award. The evaluation categories, maximum possible points for each category, and evaluation criteria for each category are as set forth in paragraphs 6.3, 6.4, 6.5, 6.6 and 6.7 below.

6.3 Specialized expertise and technical competence (possible 36 Points).

The proposed candidate's specialized expertise and technical competencies will be scored based upon the proposal's demonstration of this criteria as set forth in the paragraphs below:

- 6.3.1 A statement of each candidate's specialized expertise and technical competence. The statement must include a description of how the proposed candidate meets each of the qualifications of the ideal candidate as set forth in paragraphs 5.1 through 5.8 above.
- 6.3.2 Technical writing and diagramming capabilities using Microsoft Visio, Project, and PowerPoint. Submit one redacted current sample which will not be returned to the proposer.
- 6.3.3 Excellent oral, written, analytical and communication skills with the ability to lead a technical discussion to both technical and non-technical staff. This is to be demonstrated by top ranked candidates during their interview. (See paragraph 9.0)
- 6.3.4 A current resume for each proposed candidate.
- 6.3.5 The names, physical and electronic addresses, and telephone numbers of a minimum of three (3) clients for whom the proposed key personnel has conducted similar services. The AOC may check references listed by the proposer.

6.4 Past record of performance (possible 26 Points).

The proposed candidate's past record of performance will be scored based upon the proposal's demonstration of this criteria as set forth in the paragraphs below:

- 6.4.1 Past record of performance. Discuss the proposed key personnel's record of performance on past programs, quality of work, ability to meet schedules, cooperation, responsiveness, and other managerial considerations.
- 6.4.2 Proven track record in leading, organizing and coordinating multiple work activities.
- 6.4.3 Minimum of 2 years experience performing work similar to the work specified in this RFP with government agencies or public bodies.
- 6.4.4 Must be flexible and team-oriented.

6.5 Reasonableness of cost projections (possible 20 Points).

The proposed candidate’s reasonableness of cost projections will be scored based upon the proposal’s demonstration of this criteria as set forth in the paragraphs below:

6.5.1 Proposed rates for this position must be within the range of **\$85 to \$115** per hour for the initial term and both one-year option terms. Provide the fully burdened **hourly rate** of each proposed key personnel, and include the salary, markup (overhead and profit) breakdown for the proposed rate using the following formula:

Initial Term

	Amt Payable To The Key Personnel	\$XX.XX	XX%
+	Amt Allocated to Proposer’s Overhead	\$XX.XX	XX%
+	Amt Allocated to Proposer’s Profit	\$XX.XX	XX%
=	Total Hourly Rate For Key Personnel	\$XXX.XX	100%

First Option Renewal Term

	Amt Payable To The Key Personnel	\$XX.XX	XX%
+	Amt Allocated to Proposer’s Overhead	\$XX.XX	XX%
+	Amt Allocated to Proposer’s Profit	\$XX.XX	XX%
=	Total Hourly Rate For Key Personnel	\$XXX.XX	100%

Second Option Renewal Term

	Amt Payable To The Key Personnel	\$XX.XX	XX%
+	Amt Allocated to Proposer’s Overhead	\$XX.XX	XX%
+	Amt Allocated to Proposer’s Profit	\$XX.XX	XX%
=	Total Hourly Rate For Key Personnel	\$XXX.XX	100%

6.5.2 The cost proposal must include separate line items for travel and lodging. Travel expenses, if any, will be reimbursed in accordance with the provisions set forth in Exhibit C, Payment Provisions, in Attachment 2, Contract Terms. For purposes of this RFP, vendors are to assume allowable travel expenses will not exceed **\$20,000**, per year/per key personnel as set forth in Exhibit C, Payment Provisions, of Attachment 2, Contract Terms. In order to achieve travel cost projections for this project, the AOC prefers candidates with a local presence in the San Francisco Bay Area.

6.5.3 Include a total not to exceed contract sum for work and allowable expenses considered by this RFP during the initial term, as well as for each optional term. Keep in mind that, on a per candidate basis: (i) the minimum total cost is estimated to be **\$188,300** and the maximum total cost shall not exceed **\$247,700** for the initial term and each optional term (between **\$168,300** and **\$227,700** for work + up to **\$20,000** for allowable travel per term), inclusive of personnel, materials, markup, overhead, profit, and travel costs and expenses, and (ii) the method of payment to the consultant is anticipated to be by cost reimbursement. For purposes of this RFP, proposers are to use an estimated 1,980 hours of work per term. Consultants will not provide services on any AOC holidays or mandated furlough days which, as of this RFP and subject to change, are the third Wednesday of each month through June

2010, nor will the consultant work more than forty (40) hours per week unless preapproved, in writing, by the project manager.

6.6 Ability to meet requirements of the project (possible 10 Points).

The proposed candidate's ability to meet the requirements of the project will be scored based upon the proposal's demonstration of this criteria as set forth in the paragraphs below:

- 6.6.1 Include a statement of each proposed candidate's availability during the initial 1-year term of the contract, and each of the two optional 1-year contract renewal terms. The statement must include a disclosure of any other AOC or non-AOC contracts for work which the proposed candidate is obligated to fulfill and identify the dates or conditions which may result in periods of unavailability. The statement must also include any other anticipated periods of unavailability greater than 5 consecutive business days during the initial term. If there are no periods of unavailability, then it must be stated so.
- 6.6.2 Include a statement of each proposed candidate's ability to complete the work within the project schedule, set forth in Exhibit D, Work to be Performed, in Attachment 2, Contract Terms.
- 6.6.3 Compliance with Contract Terms. Complete and submit Attachment 3, Vendor's Acceptance of the RFP's Contract Terms. Also, if changes are proposed, submit a version of Attachment 2, Contract Terms with all tracked changes, as well as written justification supporting any such proposed changes.
- 6.6.4 For each proposed candidate during the Initial Term and Optional Terms, include a statement of primary legal residency and place of residency during the Initial Term and Optional Terms.
- 6.6.5 Proposed candidates must currently have the legal right to work for the full duration of the contract period. Include a statement regarding each proposed candidate's citizenship, legal right to work in the United States, type of visa, if any, and its expiration date.

6.7 Company Stability and Capabilities (possible 8 points).

The proposed candidate's company stability and capabilities will be scored based upon the proposal's demonstration of this criteria as set forth in the paragraphs below. Note that scoring in this category will remain the same for each proposed candidate if more than one candidate is proposed.

- 6.7.1 Number of years your firm has been in the business of providing technical staffing.
- 6.7.2 Number of full time employees (do not count placed candidates unless they are actual employees of your firm).
- 6.7.3 Disclose any judgments, pending litigation, or other real or potential financial reversals that might materially affect the viability of the proposer's firm.

- 6.7.4 Annual gross revenue from your most recent audited or reviewed profit and loss statement and balance sheet. State the audit/review year and the annual gross revenue. The AOC may request a copy of your most recent audited or reviewed profit and loss statement and balance sheet.
- 6.7.5 A description of your company's pre-screening, background checks, testing, and interview procedures.
- 6.7.6 A description of your company's process regarding replacing a candidate if necessary.
- 6.7.7 Provide a description of what, if any, health benefits, or other benefits your firm provides to your proposed candidates.
- 6.7.8 Tax recording information. Complete and submit Attachment 4, Payee Data Record Form, or provide a copy of the form previously submitted to the AOC.

7.0 SPECIFICS OF A RESPONSIVE PROPOSAL

- 7.1 Proposers may submit up to **four (4) candidates TOTAL** for consideration as key personnel. Proposals with more than four candidates may not be evaluated.
- 7.2 A cover letter referencing the proposer's point of contact, including name, physical and electronic addresses, and telephone and facsimile numbers in a cover letter.
- 7.3 Demonstration of the each candidate's and consulting firm's overall capabilities as required in Section 6.0, above.

8.0 SUBMISSIONS OF PROPOSALS

- 8.1 Responsive proposals should provide straightforward, concise information that satisfies the requirements noted in Section 7.0, Specifics of a Responsive Proposal, above. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the state's instructions, requirements of this RFP, and completeness and clarity of content.
- 8.2 Proposers must submit, in **hardcopy form, one (1) original and three (3) copies** of the proposal, signed by an authorized representative of the company, including name, title, address, and telephone number of one individual who is the responder's designated representative, and, on a **CD-ROM, one (1) electronic version of the entire proposal**.
- 8.3 Proposals must be delivered to the individual listed under Submission of Proposals, as set forth on the cover memo of this RFP.
- 8.4 Only written responses (with accompanying CD-ROM) will be accepted. Responses should be sent by registered or certified mail or by hand delivery.

9.0 INTERVIEWS

The AOC anticipates conducting interviews with top ranked proposed key personnel candidates to clarify aspects set forth in the written proposal **and to determine the candidate's oral and communications skills**. If conducted, interviews will likely be conducted at the AOC's offices in San Francisco. The AOC will not reimburse candidates for any costs incurred in traveling to or from the interview location. The AOC will notify prospective vendors regarding interview arrangements.

10.0 RIGHTS

The AOC reserves the right to reject any and all proposals, in whole or in part, as well as the right to issue similar RFPs in the future. This RFP is in no way an agreement, obligation, or contract and in no way is the AOC or the State of California responsible for the cost of preparing the proposal. One copy of a submitted proposal will be retained for official files and will become a public record.

11.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

- 11.1 The Administrative Office of the Courts is bound by California Rule of Court 10.500 (see: <http://www.courtinfo.ca.gov/rules/amendments/jan2010-2.pdf>) as to disclosure of its administrative records. If the information submitted contains material noted or marked as confidential and/or proprietary that, in the AOC's sole opinion, meets the disclosure exemption requirements of Rule 10.500, then that information will not be disclosed pursuant to a request for public documents.
- 11.2 If the AOC does not consider such material to be exempt from disclosure under Rule 10.500, the material may be made available to the public, regardless of the notation or markings. If a proposer is unsure if its confidential and/or proprietary material meets the disclosure exemption requirements of Rule 10.500, then it should not include such information in its proposal.

END OF FORM