

TO: POTENTIAL PROPOSERS

FROM: Administrative Office of the Courts
Information Services Division

DATE: April 8, 2008

SUBJECT/PURPOSE OF MEMO: To issue Addendum Number 1 to ISD2008WCM-SS and, as set forth in the attached documents: (1) to publish the AOC's Responses to Vendors' Questions, for those questions received by the deadline; (2) to replace section 6.0 of Attachment 5, Statement of Work; (3) to replace section 2.8 (b) of Attachment 2, Minimum Terms and Conditions; (3) to add RFP Section 1.3 to General Information.

ACTION REQUIRED: You are invited to review and respond to the attached Request for Proposal ("RFP") as posted at <http://www.courtinfo.ca.gov/reference/rfp/>:
Project Title: Web Content Management
RFP Number: ISD2008WCM-SS

SOLICITATIONS MAILBOX: solicitations@jud.ca.gov

DUE DATE & TIME FOR SUBMITTAL OF QUESTIONS: Deadline for submittal of questions pertaining to solicitation document was: **1:00 p.m. (PST) on April 03, 2008.**

PROPOSAL DUE DATE AND TIME: Proposals must be received by **1:00 p.m. (PST) on April 22, 2008.**

SUBMISSION OF PROPOSAL: Proposals should be sent to:
**Judicial Council of California
Administrative Office of the Courts
Attn: Nadine McFadden, RFP No. ISD2008WCM-SS
455 Golden Gate Avenue
San Francisco, CA 94102**

AOC RESPONSES TO VENDORS' QUESTIONS

Question 1.

I received the overview of the RFP. We would like to respond but I do not have the attachments? Could you please pass along to me the complete RFP?

AOC Response to Question 1:

**The RFP ISD2008WCM-SS may be found at
<http://www.courtinfo.ca.gov/reference/rfp/wcm-rfp.htm>**

Question 2.

Regarding RFP section 1.1.3, is it your expectation that all content, personalization rules, retention policies, security rules, and editorial/approval business processes will be defined, enforced, administered, and stored in the external, hosted environment? Similarly, will there be any component of the solution that you foresee hosting internally?

AOC Response to Question 2:

The AOC anticipates that the WCM solution software will be maintained by the vendor in an off-site hosting center. Beyond this assumption, the AOC is open to options regarding the details of the solution architecture. For the purposes of this solicitation, the AOC is not considering internal hosting of the complete solution. The AOC anticipates that the solution may interface with internal systems as required (e.g. Windows Active Directory, Microsoft Outlook, internal databases and/or web applications).

Question 3.

Do you foresee the hosted solution being provided by a vendor that specializes in Web Content Management as a service (software-as-a-service, SaaS), or by a vendor who provides hosting of Commercial Off The Shelf (COTS) web content management solutions? Is either model preferred or expected?

AOC Response to Question 3:

The AOC is open to either a hosted “software-as-a-service” solution or a hosted “commercial off the shelf” solution. Neither is preferred or expected. Vendors will be evaluated according to the criteria outlined in RFP section 10. The AOC seeks a solution that will best fit the requirements outlined in the RFP.

Question 4.

There are many internal websites that are to ultimately be created and maintained. Will any of those websites contain or distribute sensitive or secure information? If so, is it acceptable that that information will be managed and stored by an external organization?

AOC Response to Question 4:

The AOC websites do contain and distribute sensitive and secure information on the intranet and extranet sites. The AOC will evaluate a vendor's ability to keep such information secure per responses to RFP sections 8.9, System Security and 8.10, Hosting Environment. In consideration of this, it is acceptable that this information be managed and stored by an external organization.

Question 5.

Does the state have a standard Software-as-a-Service contract? If not, would the state be open to consideration of using the vendor's contract?

or

Does the state have alternative standard terms for a Software-as-a-service solution (where no license to install/backup exists)?

AOC Response to Question 5:

The AOC does not have a standard SaaS contract or alternative standard terms for a SaaS solution.

The AOC is not open to using the vendor's contract; rather, the AOC requires a markup of Attachment 2, Minimum Contract Terms. The vendor is instructed to make any and all necessary redlines (with explanation, as instructed by the RFP in sections 4.3 and 8.17.1) to Attachment 2 (such as modifications to software license terms) for review and consideration by the AOC.

Question 6.

When considering a software-as-a-service offering, will the state be open to advance payment for the annual subscription license?

AOC Response to Question 6:

Pricing and payment are subject to proposal and discussion.

Question 7.

Is it a requirement to have the vendor project manager assigned exclusively to AOC?

AOC Response to Question 7:

No, it is not a requirement to have the vendor project manager assigned exclusively to the AOC. The requirement (from Attachment 2 Section 2.8 (b) has been stricken in this addendum. The Statement of Work will be Deliverables based and the Vendor Project Manager should be adequately allocated to support completion of Deliverables per dates agreed upon by the AOC and Vendor.

Question 8.

Is an on-site project manager an absolute requirement?

AOC Response to Question 8:

No, an on-site project manager is not an absolute requirement. The requirement (from Attachment 5, Section 6.1) has been stricken in this addendum. The Vendor should propose based on their best recommendation for completion of Deliverables and success of the project.

Question 9.

Is use of Microsoft project an absolute requirement?

AOC Response to Question 9:

No, the use of Microsoft project is not an absolute requirement. The requirement (from Attachment 5, Section 6.3) has been modified in this addendum.

Question 10.

Will all sites in SOW section 3.1.1 (intranet excepted) described be consolidated into the new single domain and design?

AOC Response to Question 10:

The AOC intends that all sites outlined in SOW section 3.1.1 will be consolidated into a single domain and design. However, the design has yet to be approved by AOC Stakeholders and is subject to change. Additionally, detailed analysis prior to migration of existing site contents may require alternate design solutions.

Question 11.

Regarding Attachment 9, Question F, “How does the WCMS support dynamic content based on database queries?”

Is this in reference to dynamic content from within the WCM content repository or to external 3rd party content that lives elsewhere?

AOC Response to Question 11:

This may involve content within the WCM repository and also content from other AOC databases maintained separately from the WCMS.

Question 12.

Regarding Attachment 9, Question J, “Describe how the WCMS can interface/interact with external applications. Can calls to other applications be integrated within a workflow?”

Please provide two examples of applications you may want to call within a workflow.

AOC Response to Question 12:

Two examples: a translation application or a document management system.

Question 13.

Can a proposed solution use off-shore resources for some part of the solution team? The contract will be with a California corporation, but we would like to submit a proposal that will employ off-shore resources in Bulgaria or India. We would like to know if use of these resources would disqualify the RFP or have no effect on the bid. Such a determination would have an obvious impact on our cost analysis.

AOC Response to Question 13:

Use of off-shore resources would not disqualify an RFP. However, it is the preference of the AOC, as a branch of government, not to use off-shore labor.

Question 14.

The RFP States you are currently in a design phase with another firm. Does the AOC anticipate this firm bidding the Content Management System portion of the project as well?

AOC Response to Question 14:

Section 1.3 has been added to the RFP in this addendum to address this question. Per this section, “certain groups and/or individuals currently retained by the AOC for the web redesign effort (pursuant to RFP No. EOP-0307-RB) may not participate in this RFP.”

Question 15.

Does the AOC require the vendor to aide with or develop any new content?

AOC Response to Question 15:

The AOC would not require the WCM vendor to develop new content. To realize the full functionality of the new design within the new WCM solution, however, new pages (yet to be determined) may need to be created. These pages or other content may come to light pending selection and subsequent detailed design of WCM functionality in support of the redesign.

Question 16.

Realizing the AOC is approving a design now from another vendor, they may be certain problem areas within the design in regards to a content management system. Is the AOC open to small revisions to the design to account for these issues? Who will be responsible for these small redesign options?

AOC Response to Question 16:

The AOC would be open to small revisions of the design that achieve a similar functionality. The roles and responsibilities pertaining to coding of the display templates that reside within the WCM should be determined via negotiation of the Deliverables in Attachment 5, Statement of Work.

Question 17.

Per section 4.2.2 of Attachment 5, Statement of Work- For Use Cases – with the AOC provide user profiles to the vendor or will the vendor be required to come up with those on its own?

AOC Response to Question 17:

As section 4.2.2 of the Attachment 5, Statement of Work, does not address Use Cases, the AOC will answer this question for section 4.3.2 of the Statement of Work.

The AOC has developed a preliminary list of potential WCM roles and users. These may change depending upon the selected WCM solution, and the AOC would also expect the vendor to review this list and make recommendations based upon its software requirements, past expertise and other yet to be determined aspects of the implementation.

Question 18.

In regards to the content audit reference in Section 4.4.1 of Attachment 5, Statement of Work: to complete the audit, does the AOC anticipate the vendor meeting with several distinct ‘departments’ to determine which content should stay or go? Can the AOC provide an estimate of how many people the vendor will need to interface with in order to accomplish this goal?

AOC Response to Question 18:

The AOC anticipates that the Vendor would work with a dedicated team of AOC resources to complete the content audit. The AOC team would provide information required by the Vendor in support of the Deliverable’s completion. The AOC may limit the Vendor’s interaction with AOC and appellate court stakeholders to expedite the process and provide the vendor with specific points of contact. The AOC will look to the Vendor for expertise and guidance throughout this process.

Question 19.

Is there a requirement as to the type of programming language or databases you require (e.g. PHP, ASP, CF, SQL, MySQL, PostgreSQL)?

AOC Response to Question 19:

The AOC has outlined technical requirements in Attachment 10. The AOC does not have a specific programming language or database requirements, so long as the solution adequately addresses all points outlined in Attachment 10.

Question 20.

Is there any requirement of registration for vendors to bid on RFP: ISD2008WCM-SS? Our company would like bid on the previously mentioned RFP.

AOC Response to Question 20:

No, vendors are not required to register to bid on the RFP.

Question 21.

Does this solicitation have an incumbent(s)? If so, who is the incumbent(s) and how long has incumbent(s) performed web content management services for the AOC?

AOC Response to Question 21:

No, the solicitation does not have an incumbent.

Question 22.

Will the AOC consider issuing awards to multiple vendors?

AOC Response to Question 22:

Please refer to RFP Section 11.0, Rights, for detail on this.

Question 23.

Is it acceptable for potential bidders to bid on a specific phase of the overall project, but not all phases?

AOC Response to Question 23:

Proposers must respond to the complete solicitation as stated in RFP Section 8.0, Specifics of a Responsive Proposal.

Question 24.

Section 6.1.2.3 identifies a need for an Extranet platform, how many users would need access to the Extranet.

or

For the Extranet user base, would these be AOC court personnel or external users?

AOC Response to Question 24:

The Extranet user base includes all employees and partners of the California State Judicial Branch.

Question 25.

Does the required Project Manager need to have any specific accreditation or certification?

AOC Response to Question 25:

No, the Project Manager is not required to have specific accreditation or certification.

THE FOLLOWING SECTION REPLACES ATTACHMENT 5, SECTION 6.0, THE PROJECT MANAGEMENT PROCESS.

- 6.0 The Project Management Process
- 6.1 The Vendor ~~shall~~ should provide an ~~on-site~~ experienced Senior Project Manager to the AOC account.
- 6.2 The Vendor shall staff an upper-level relationship manager for this account, providing strategic support, a senior interface with AOC leadership, and a point of escalation for any and all needs.
- 6.3 The Vendor shall use Microsoft Project standard project management methodology and tools (e.g. Microsoft Project or similar software) to manage the project timeline and Deliverables, offering a documented manner in which to monitor project progress and identify critical path Deliverables.
- 6.4 The Project Management Team shall deploy a secure project site which can serve as a central workspace for project documents (statements of work, Deliverable documents, project plans, etc.) and team contact information. This will be deployed during Project Initiation.
- 6.5 The AOC and Vendor will assemble a Project Management Team (Project Management Team), consisting of no more than three (3) representatives from each party. This team shall include the Vendor and AOC Program and Project Managers.
- 6.6 The Vendor shall coordinate Deliverable review via a process agreed upon by the Project Management Team.

THE FOLLOWING SECTION REPLACES ATTACHMENT 2, SECTION 2.8 (B), PROJECT STAFF.

- 2.0 Vendor Project Manager. The Vendor employee identified in Exhibit G as the Vendor project manager (the "Vendor Project Manager") shall serve, from the Effective Date, as the Vendor project manager and primary Vendor representative under this Agreement. ~~The Vendor Project Manager shall serve on a full time basis under this Agreement. Any change in the Vendor Project Manager shall be subject to the AOC's prior written approval.~~ Before assigning an individual as a Vendor Project Manager, whether as an initial assignment or a subsequent assignment, Vendor shall notify the AOC of the proposed assignment, introduce the individual to appropriate AOC representatives and provide the AOC with a résumé and other information about the individual reasonably requested by the AOC. The Vendor Project Manager shall (i) have overall responsibility for managing and coordinating the performance of Vendor's obligations under this Agreement, including the performance of all Vendor Contractors, and (ii) be authorized to act for and bind Vendor and Vendor Contractors in connection with all aspects of this Agreement. The Vendor Project Manager shall respond promptly and fully to all

inquiries from the AOC Project Manager during the term of this Agreement and the Termination Assistance Period. The Vendor Project Manager responsibilities shall include: (1) preparing meeting documentation and making on-going project presentations on project status and other related project topics as identified by the AOC; (2) providing administrative, supervisory, and technical direction to Project Staff; (3) monitoring performance hereunder for accuracy, timeliness, efficiency and adherence to the terms and conditions of this Agreement; and (4) coordinating the resolution of Agreement issues and the implementation and enforcement of problem escalation procedures.

THE FOLLOWING SECTION HAS BEEN ADDED TO RFP SECTION 1.0, GENERAL INFORMATION.

1.3 Note on Eligibility.

Please note that certain groups and/or individuals currently retained by the AOC for the web redesign effort (pursuant to RFP No. EOP-0307-RB) may not participate in this RFP.