

RFP Title: **WebEx Replacement Project**
RFP Number: **IT-072414-WXRP-CF**



REQUEST FOR PROPOSALS

JUDICIAL COUNCIL OF CALIFORNIA

REGARDING:

RFP TITLE:
WebEx Replacement Project

RFP NUMBER:
RFP # IT-072414-WXRP-CF

PROPOSALS DUE:
August 25, 2014, NO LATER THAN 1:00 P.M. (PDT)

1.0 BACKGROUND INFORMATION

1.1 The Judicial Council presently uses Cisco WebEx WebOffice cloud based service to securely share files between the Judicial Council, courts, contractors, and other third parties. The service has been in use for 10 years and currently serves approximately 700 active users across the state. It is a business critical service for sharing documents securely with the Judicial Council’s business partners. Users include project teams, committees, working groups and task force members. Currently there are 245 different groups of users sharing 10s of thousands of documents. Total volume of documents on disk is 47GB.

Cisco WebEx has announced end of life of this product/service with no path forward, and the last day of service is November 30, 2014. The Judicial Council must migrate to a different service provider before November 30, 2014.

2.0 DESCRIPTION OF HOSTED SOLUTION SUBSCRIPTION SERVICES AND MIGRATION SERVICES

2.1 The Judicial Council seeks **Hosted Solution Subscription Services and Migration Services solutions** meeting the following specifications:

Priority	No.	Requirements
High	101	Ability to share Folders and Documents with authorized users over the Internet
Medium	102	Ability to version documents/ Including check-in and check out
Medium	103	Ability to configure notifications for changes/updates to documents
Medium	104	Ability to group edit a Microsoft Office document
High	105	Ability to implement parts of functionality optionally and per user group
Medium	106	Integration with the Judicial Council Active Directory for internal user authentication
High	107	Ability to authenticate users from Internet using the service provider's authentication
High	108	Ability to brand the home and login screen of the service
High	109	Ability to batch upload and batch download folders and documents
High	110	Support for using Windows File Explorer (and Mac equivalent) to directly browse the contents of directories
High	111	Authorization and access to the folders & documents via Role Based Access Control
High	112	Ability to selectively specify and manage permissions for Read, Write access to individual folders
High	113	Ability to delegate administration per sub tree of directory/folder structure and contents
Low	115	Support for Web Service and REST API (Similar to DMS API)

Priority	No.	Requirements
Medium	117	Provide migration services for Users, Groups, Rights/ Permissions, Folders and Files
High	118	Built-in reports about Users and Administrators (frequency of usage, least used, last used, etc)
High	120	Responsiveness and usability of the service meet Judicial Council expectations
High	121	Ability to search tags, metadata, and full text of the documents
High	122	Storage requirements: 100GB minimum to start with flexibility to add as needed
Medium	123	Group collaboration functionality: shared development of documents
High	124	Provide document types supported and size limitations on the documents
Medium	125	Ability to configure Document Workflow and Approval processes
High	126	Ability to have regular backups of documents. Ability to have the documents restored from backup by request.
Medium	128	Integration with current versions of Microsoft Office
High	129	Support for most popular Browsers (IE, Chrome, FireFox, and Safari), current versions and a few versions back
Low	131	Ability to tag content and add metadata to the documents
High	133	Ability to have a Branded URL (At least the URL prefix has to reflect the Judicial Council's selected URL)
Medium	134	Administrator and User training options
High	135	Help Desk for customer support
Low	136	Ability to create surveys, conduct surveys, and report on results of the surveys
Medium	137	User identification by department for charge back of usage at Judicial Council

Priority	No.	Non Functional Requirements
High	116	Secure over the network. Must support "https" over the network
High	119	Meets the Judicial Council criteria for billing (Annual Net 60)
High	127	Ability to restore service in case of disaster at the service
High	130	Migration Services solution is within the not to exceed, one-time budget limit of \$25,000.00 .
High	132	Hosted Solution Subscription Services solution is within the estimated annual price range of \$30,000.00 to \$60,000.00 .
High	138	Implementation to be complete for User Acceptance testing no later than October 15, 2014
High	139	Ability to go live in Production no later than November 15, 2014
High	140	Data, systems, and all support staff must reside within the United States

- 2.2 Refer to Attachment 7, **WebEx Replacement Requirements Answer Form** and provide *Yes* or *No* answers to indicate Proposer’s capabilities of meeting the specifications listed above.
- 2.3 The Judicial Council seeks the services of a person or entity with expertise in migration of the existing WebEx WebOffice folders, documents, and users, along with their permissions (Migration Services) to the newly selected Hosted Solution Subscription Services.

3.0 TIMELINE FOR THIS RFP

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

NO.	EVENT	DATE
1.	RFP issued	August 15, 2014
2.	Deadline for questions	August 19, 2014
3.	Questions and answers posted <i>(estimate only)</i>	August 21, 2014
4.	Latest date and time proposal may be submitted	August 25, 2014, No later than 1:00 PM (PDT)
5.	Evaluation dates of non cost portion of proposals that meet required proposal content <i>(estimate only)</i>	August 26 - 27, 2014
6.	Anticipated interview and demonstration dates <i>(estimate only)</i>	August 28 – 29, 2014
7.	Evaluation results of non cost portion of proposals posted <i>(estimate only)</i>	September 2, 2014
8.	Public opening of the cost portion of proposals date <i>(estimate only)</i>	September 3, 2014, 10:00 AM (PDT)
9.	Evaluation of cost portion of proposals date <i>(estimate only)</i>	September 3, 2014
10.	Notice of Intent to Award posted <i>(estimate only)</i>	September 5, 2014
11.	Negotiations and execution of contract <i>(estimate only)</i>	September 10, 2014
12.	Contract start date for Migration Services <i>(estimate only)</i>	September 15, 2014
13.	Contract end date for Migration Services <i>(estimate only)</i>	December 15, 2014
14.	Contract start date for Hosted Solution Subscription Services <i>(estimate only)</i>	September 15, 2014

NO.	EVENT	DATE
15.	Contract end date for Hosted Solution Subscription Services (<i>estimate only</i>)	September 14, 2017

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: Judicial Council Standard Terms and Conditions for IT Services	If selected, the person or entity submitting a proposal (the “Proposer”) must sign: this Judicial Council 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 or redline exceptions using <i>Track Changes</i> .
Attachment 4: General Certifications Form	Proposer must complete the General Certifications Form and submit the completed form with its proposal.
Attachment 5: Small Business Declaration	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 Judicial Council requires in order to process payments and must be submitted with the proposal.
Attachment 7: WebEx Replacement Requirements Answer Form	Proposer must complete this form to indicate proposed solution’s capabilities of meeting WebEx replacement specifications.

5.0 PAYMENT INFORMATION

Payment information is as follows:

- 5.1 The basis for payment is: 1) one-time cost of Migration Services; and 2) annual cost of Hosted Solution Subscription Services.
- 5.2 Budgetary limits:
 - a. **Migration Services**
Not to exceed, one-time cost is **\$25,000.00**
 - b. **Hosted Solution Subscription Services**
Estimated annual cost range is **\$30,000.00 to 60,000.00.**
- 5.3 Travel will not be required.

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.
 - a. The Proposer must submit **one (1) original and four (4) 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 (and the copies thereof) must be submitted to the Judicial Council in a single sealed envelope, separate from the cost portion. **(See also paragraph c. below.)** 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 four (4) copies** of the cost portion of the proposal in a separate, sealed envelope. 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 Judicial Council in a single sealed envelope, separate from the non-cost portion. **(See also paragraph c. below.)** The Proposer must write the RFP title and number on the outside of the sealed envelope.
Note: The date, time and location of the public opening of the cost portion of the proposal are as follows:

RFP Title: **WebEx Replacement Project**
RFP Number: **IT-072414-WXRP-CF**

Date: September 3, 2014
Time: 10:00 AM (Pacific Time)
Location: 455 Golden Gate Avenue, 6th Floor
Conference Room # 6321
San Francisco, CA 94102
(See 6th Floor Receptionist for access)

- c. The Proposer must submit electronic versions of both the non cost portion of the proposal and the cost portion of the proposal on **separate USB memory sticks/ flash drives** to be included, respectively, in the sealed envelopes described above. Files must be in PDF, Word, and/or Excel formats.

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

Judicial Council of California
Administrative Office of the Courts
Attn: Nadine McFadden, **RFP #IT-072414-WXRP-CF**
455 Golden Gate Avenue, Sixth Floor
San Francisco, CA 94102

6.4 **Late proposals will not be accepted.**

6.5 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 email.

7.0 PROPOSAL CONTENTS

7.1 Non-Cost Portion of Proposal. 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 Hosted Solution Subscription Services the Proposer proposes to supply to the Judicial Council, including warranty information.

- d. Names, addresses, and telephone numbers of a minimum of **three (3) clients** for whom the Proposer has provided similar Migration Services and Hosted Solution Subscription Services. The Judicial Council may check references listed by the Proposer.
- e. For each key staff member: a resume describing the individual's background and experience, as well as the individual's ability and experience in conducting the proposed activities.
- f. Proposed method to complete the work.
 - i. Describe the proposed method to complete the work, including a detailed work plan with milestones and deliverables
 - ii. Describe the plan you will implement to ensure continued customer satisfaction throughout this engagement. Include items such as guarantees, client surveys, problem escalation procedures, and periodic meetings with the Judicial Council Project Manager.
 - iii. Describe your proposed invoicing process. Please note that the Judicial Council will make every effort to insure that invoices are paid promptly, but is unable to pay any late fees or interest payments on invoices past due.
- g. 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.
- h. Transition Services
Description of Transition Services offered by Proposer in the event that:
1) Proposer announces end of life of its Hosted Solution Subscription Services with no path forward; 2) either party provides 30 days written notice of termination for cause or convenience; or 3) upon expiration of the agreement.
- i. Licensed Software Agreement Terms and Conditions or Hosted Solution Subscription Services Terms of Use.

Proposer must submit a copy of its Licensed Software Agreement Terms and Conditions or Hosted Solution Subscription Services Terms of Use, as applicable, for Judicial Council’s review and evaluation.

- j. Certifications, Attachments, and other requirements.
- k. The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.
 - i. In the event that a contract awarded under this RFP will include tangible property, the Proposer must submit with its proposal, for itself and each of its affiliates that make sales for delivery into California, a copy of either (i) a California seller's permit issued under Revenue and Taxation Code section 6066 et seq. or (ii) a certificate of registration issued under Revenue and Taxation Code section 6226.
 - 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.
 - 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).

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

a. **Hosted Solution Subscription Services:**

- i. The cost per unit proposed for the Hosted Solution Subscription Services described in the non-cost portion of proposal information.
- ii. The total contract amount proposed annually for a three (3) year Initial Term for the Hosted Solution Subscription Services described in 7.1, Non-Cost Portion of Proposal and in accordance with Attachment 2, *Contract Terms and Conditions*.^{1,2}

Note: At its sole discretion the Judicial Council may elect to exercise two additional option terms via bilateral amendment, as agreed to by the parties, for a total contract duration of five (5) years.

- iii. A full explanation of all budget line items in a narrative entitled “Budget Justification.”
- iv. A **Costing Matrix**² (See table below for example purposes only):

Hosted Solution Subscription Services¹

#	Item Description	Initial Term (Fixed Rates)			First Option Term	Second Option Term
		FY2014-15	FY2015-16	FY2016-17		
1.	End user Fees ¹					
	Qty	800	800	800	[TBD]	[TBD]
	Rate per User per Month	\$3.50	\$3.50	\$3.50	[TBD] ²	[TBD] ²
	Amount	\$33,600.00	\$33,600.00	\$33,600.00	[TBD]	[TBD]
2.	Storage (Disk Space) ¹					
	Qty	35,000	35,000	35,000	[TBD]	[TBD]
	Rate per GB per Month	\$0.03	\$0.03	\$0.03	[TBD] ²	[TBD] ²
	Amount	\$12,600.00	\$12,600.00	\$12,600.00	[TBD]	[TBD]
3.	SSL Encryption Security					
	Qty	12	12	12	[TBD]	[TBD]
	Flat Monthly Rate	\$25.00	\$25.00	\$25.00	[TBD] ²	[TBD] ²
	Amount	\$300.00	\$300.00	\$300.00	[TBD]	[TBD]
4.	Full text search					
	Qty	12	12	12	[TBD]	[TBD]
	Flat Monthly Rate	\$15.50	\$15.50	\$15.50	[TBD] ²	[TBD] ²
	Amount	\$186.00	\$186.00	\$186.00	[TBD]	[TBD]
5.	Etc.					
	Qty				[TBD]	[TBD]
	Rate				[TBD] ²	[TBD] ²
	Amount				[TBD]	[TBD]
	Not to Exceed Total	\$46,000.00	\$46,000.00	\$46,000.00	[TBD]	[TBD]

¹ **Include scalability in terms of Users and Disk Space/ Storage costing.**

² Refer to Exhibit B, Section 2, *Rate Adjustments* and note that any request by the parties for rate change(s) must be based on CPI increases/decreases from the prior year and made in writing 90 days prior to expiration of the current option term.

b. Migration Services:

- i. A detailed line item budget showing unit cost/rate, quantity, deliverable cost and the not to exceed total cost of the proposed Migration Services.
- ii. A full explanation of all budget line items in a narrative entitled “Budget Justification.”
- iii. A Costing Matrix (See table below for example purposes only):

Migration Services

#	Service Deliverables Description	Unit Cost/Rate	Qty	Cost
1.	Project plan that meets project timeline with identified resources			
2.	URL setup			
3.	Customized user home login screen with configurable features via Administrator			
4.	User setup. Setup all users that currently exist in the WebEx solution.			
5.	Setup of all user folders with appropriate access permissions			
6.	Import of documents into appropriate folders [Pre-live to User Acceptance Testing (UAT) and Go-live] (Target Due by Date: October 15, 2014)			
7.	User Acceptance Testing			
8.	Email communication to users with URL, User ID, and temporary password, Pre-Go-live or on Go-live date (Target Due By Date: November 15, 2014).			
9.	Go-live support			
10.	Go-live Administrator turnover and training			
11.	Gold copy of WebEx data at point of Go-live			
12.	Migration Services Complete (Target Due by Date: December 15, 2014)			
Not to Exceed Total				

- c. A “not to exceed” total for all work and expenses payable under the contract, if awarded.

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 Judicial Council 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 at <http://www.courts.ca.gov/rfps.htm>.

At the time proposals are opened, each proposal will be checked for the presence or absence of the required proposal contents.

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

If a contract will be awarded, the Judicial Council will post an *Intent to Award* notice at <http://www.courts.ca.gov/rfps.htm>.

Evaluation Criteria

CRITERIA	REFERENCE	MAXIMUM NUMBER OF POINTS
Ability to meet Project requirements	2.1 and Attachment 7; 2.2; 2.3; and 6.0;	15
Experience on similar assignments	7.1, d; and 7.1, f.	10
Credentials of staff to be assigned to the project	7.1, e.	5
Acceptance of Contract Terms and Conditions	7.1, h; and Attachment 3	10
Ability to meet timing requirements to complete the project	1.1; 3.0; and 7.1, g, i and ii	10
Cost	5.0; and 7.2.	50
	Total Points	100

10.0 INTERVIEWS

The Judicial Council **will 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 **will require a demonstration**. The interview may also require a demonstration of equivalence if a brand name is included in the specifications.

Note: Interviews and demonstrations may be conducted in person, by phone and/or online via WebEx.

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.

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 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.

12.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE

The AOC has waived the inclusion of DVBE participation in this solicitation.

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 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. 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.

RFP Title: **WebEx Replacement Project**
RFP Number: **IT-072414-WXRP-CF**

To receive the small business preference, the Proposer must be either (i) a Department of General Services (“DGS”) certified small business or micro business 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.

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 Judicial Council to receive a solicitation specifications protest is the proposal due date set forth in Section 3, *Timeline For This RFP*. Protests should be sent to:

Judicial Council – Business Services
ATTN: Protest Hearing Officer
455 Golden Gate Avenue, Sixth Floor
San Francisco, CA 94102