|  |  |
| --- | --- |
|  | RFI Response TemplateAppendix I  |
| ***template Shall be completed Following the Instructions noted BELOW*****RFI Title:** **FACILITIES SERVICES’ CAFM 2.0 PROJECT,** **AN INTEGRATED WORKPLACE MANAGEMENT SYSTEM (IWMS)****RFI Number: IT-2019-01-BD****SOLUTION RESPONSE DUE:** April 23, 2019 *NO* later than 5:00 pmPacific Time  |

|  |
| --- |
| Insert Cover Letter here  |

***Vendor Information***

|  |  |
| --- | --- |
| Company Name: |  |
| Address: |  |
| Phone: |  |
| Fax: |  |
| Federal Tax ID Number: |  |

|  |  |
| --- | --- |
| Representative Name: |  |
| Title: |  |
| Address: |  |
| Phone: |  |
| E-mail: |  |

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1. Response to CAFM 2.0 Project Request for Information

**1.1Instructions.** *Throughout this template instructions are in italics.* The designator, “[INSERT CONTENT HERE],” shall be replaced by the vendor’s response content. Sections including braces are optional “{Optional},” and the vendor may elect to include or exclude as part of their response to this RFI.

**1.2 Minimum Qualifications.**  Response vendor must meet the following minimum qualifications for the Judicial Council to consider its solution as a viable option:

a)Shall have successfully implemented an Integrated Workplace Management System (IWMS) for a minimum of two (2) large public sector agencies (government entity preferred) with at least 15,000 employees and within the last three (3) years.

b) Shall have successfully implemented an IWMS for a minimum of one public sector agency with an operating budget of at least five hundred (500) million dollars.

c) Shall have successfully provided an IWMS post-implementation support services for a minimum of two public sector organizations.

d) The solution vendor that may be selected as the result of a future solicitation will need to be ***certified*** with the California Secretary of State to do business in the State of California.

**1.3Submission of Response**. Vendor’s responses, including of Appendixes I, II, and III, may be delivered by mail on a non-rewriteable flash drive to the below address, or sent via email to:

*solicitations@jud.ca.gov*

*Attention: Sheryl Berry, Administrative Assistant II*

*Branch Accounting and Procurement*

*455 Golden Gate Avenue, 6th Floor*

*San Francisco, CA 94102*

**1.4 [ ]  Check.** Response vendor has fully responded to each of the separately attached documents *including Appendix I: Vendor Response Template, Appendix II: CAFM 2.0 Requirements, and Appendix III: RFI Pricing/Cost Workbook Template.*

* 1. Executive Summary and Introduction

a) *This section should contain a high-level summary of the Response Vendor’s company and the CAFM 2.0 Project solution response, with an introduction explaining all the feature components of the vendor’s solution.*

* 1. Company Overview

|  |
| --- |
| **Company Information** |
| **Company name** |  |
| **RFI Response lead/account executive name, title and contact information:** |  |
| **Industry (NAICS)** *(North American Industry Classification System)* |  |
| **Fiscal 2018 company revenue** |  |
| **Fiscal 2018 company net income** |  |
| **Headquarters Location** |  |
| **Date Founded** |  |
| **Company Ownership***(i.e. private/public, joint venture)* |  |
| **Number of years Response Vendor has been providing Enterprise IWMS Implementation and User Training services:** |  |
| **Number of employees:****Total:****Implementation services:** |  |
| **Service delivery locations in the continental United States:** |  |
| **End of Table** |

**1.8 References**

*Provide at least three customer references (government sector preferred and/or public sector) for whom your company has provided comparable service. The FSO has response vendor’s permission to contact references directly if desired.*

| **Reference # 1** |
| --- |
| **Customer (organization) Company Name** |  |
| **Industry** |  |
| **Customer Contact Name and Title** |  |
| **Address** |  |
| **Telephone**  |  |
| **Response Vendor’s Project Manager Name** |  |
| **Please provide the Internet links to either the IWMS service or to the entity that use the IWMS service.** |  |
| **Describe how this product has become your Enterprise IWMS solution.** |  |
|  |  |

| **Reference # 2** |
| --- |
| **Customer (organization) Company Name** |  |
| **Industry** |  |
| **Customer Contact Name and Title** |  |
| **Address** |  |
| **Telephone**  |  |
| **Response Vendor’s Project Manager Name** |  |
| **Please provide the Internet links to either the IWMS service or to the entity that use the IWMS service.** |  |
| **Describe how this product has become your IWMS solution.** |  |
|  |

| **Reference # 3** |
| --- |
| **Customer (organization) Company Name** |  |
| **Industry** |  |
| **Customer Contact Name and Title** |  |
| **Address** |  |
| **Telephone**  |  |
| **Response Vendor’s Project Manager Name** |  |
| **Please provide the Internet links to either the IWMS service or to the entity that use the service.** |  |
| **Describe how this product has become your IWMS solution.** |  |
|  |  |

1. Response Vendor’s Solution Overview

*a) Present a high-level overview of features and capabilities of the solution application software and the service offering, example Software as a Service (SaaS), and/or Infrastructure as a Service (IaaS) hosting. This part of the response is a free narrative section, although we encourage an outline addressing the IWMS Functional Domains.*

***\*Note****, the content may overlap with content provided in other sections of the response; but should not directly replicate other content. It is acceptable to refer to the detailed information and supporting tables, charts, and graphs provided in other sections of the response.*

[INSERT CONTENT HERE]

* 1. CAFM 2.0 - IWMS Solution Offering

*Provide a comprehensive description about the actual solution and services offering (e.g. SaaS, IaaS Hosting, etc.) being proposed to address the CAFM 2.0 Requirements. Response shall include the following information:*

*a) Who is the primary responder and/or partner(s) providing the solution offering, and what part will each entity provide.*

*b) If the solution offering will be SaaS, provide the details of what the SaaS includes, as well as detailed subscription information, and if hosting costs are included in the software pricing, describe how maintenance upgrades/patches will be managed, etc.*

*c) If the solutions offering is an IaaS approach, please include the details of what the IaaS hosting includes, how the Solution software will be supported, and how maintenance upgrades/patches will be managed.*

[INSERT CONTENT HERE]

* 1. CAFM 2.0 - IWMS Solution Implementation Plan

*Provide implementation details pertaining to the actual solution and services being proposed to address the RFI.*

*a) Discuss the structure of the project, including the deployment strategy, and the length (e.g. weeks or months) of the project. Will the IWMS Functional Domains listed below be deployed simultaneously or in phases? Provide a diagrams and/or Gantt charts, or any other accompanying information to demonstrate what the approach will look like.*

*b) Provide details on how the solution will be implemented, addressing the tasks required to deploy the following CAFM 2.0 IWMS Functional Domains:*

* *Space & Facilities Management,*
* *Real Estate Portfolio Management*
* *Capital Project Management*
* *Maintenance Management*
* *Sustainability & Energy Management*

*c) Include the primary responder, the implementation firm and/or partners who may deliver and implement the solution, estimated number of resources required, assumptions and risks, and resources that may be required from the Judicial Council.*

[INSERT CONTENT HERE]

* 1. CAFM 2.0 - IWMS Migration and Integration Plan

*a) System Migration. Provide details on the strategy/approach for migrating the FSO’s existing data to the new solution. Address tasks required to migrate the data, including estimated timeline (e.g. weeks or months), diagrams and Gannt charts, estimated number of resources required, assumptions and risks, and resources required from the Judicial Council.*

*b) System Integration. Provide details on the strategy/approach for integrating the new solution with other systems per the CAFM 2.0 integration requirements (Appendix II). Address the tasks required, including estimated timeline (e.g. weeks or months), diagrams and Gannt charts, estimated number of resources required, assumptions and risks, and resources required from the Judicial Council.*

[INSERT CONTENT HERE]

* 1. Response Vendor Experience and Qualifications

*a) Provide a description of the response vendor, its project team, and support staff’s qualifications and experience pertaining to the CAFM 2.0 solution implementation.*

[INSERT CONTENT HERE]

*b) In addition, complete the table below to provide specific staffing data (add additional rows as needed).*

**Solution Implementation Project Team and Support Staff description**:

|  | **Vendor Employees** | **Vendor Sub-Contractors / Partners** |
| --- | --- | --- |
| Role / Title | NumberEmployee | Average Years on a public sector project | Number of Sub-Contractors Employees / Partner | Average Years on a public sector project |
| e.g. Project Manager  | # | # | # | # |
| … |  |  |  |  |
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* 1. Business Solution Response to CAFM 2.0 Requirements

*a) Provide a detailed narrative of the response vendor’s solution (application software), by completing each of the worksheets included in attachment file IT-2019-01-BD CAFM 2-0 Requirement.xlsx (Appendix II), and by addressing each of the noted requirements. Select a “Vendor Response Code” and provide “Vendor Response Comment(s)” for each item.*

[INSERT ADDITIONAL RESPONSE(S) TO APPENDIX II HERE]

**Additional detail regarding CAFM 2.0 Requirement, Appendix II, as follows:**

**See the “Introduction Section” within Appendix II for further detail.** If the “Vendor Response Comment” worksheet cell(s) require additional information or exhibits that are greater than the cell can handle, content may be inserted herein section 2.5 Business Solution Response. Ensure that additional content includes a reference to the Requirement ID(s) number (RQM ID) and include a comment in the vendor response worksheet cell noting that a detailed response is provided in Appendix I, Section 2.5.

**The response vendor must address each mandatory requirement and deliverable.** Mandatory requirements are designated with a Priority Rating “1”, which is a “Critical / High Priority Requirement / Must Have”. Failure to respond to a requirement or deliverable may be cause for a non-consideration of the response vendor’s solution.

1. Supporting Documentation

*Provide technical and other reference documentation that the response vendor chooses to include to support statements and information provided. This may include explanations referenced in the requirements response matrices (e.g. from “Vendor Response Comment” column) where substantive technical information should be highlighted.*

*This can be done by marking the applicable page submissions (e.g. circling, underlining, bracketing, using a highlight marker that will still show when reproduced, etc.). Any reference to cost figures in the literature must be redacted and replaced with “XXXX.”*

*For Third-Party Products/Optional Software, the response vendor must explicitly state the name of any third-party products that are part of the response vendor’s solution for the CAFM 2.0 Project. For each third-party product there must be a statement about whether the response vendor’s solution will encompass the third-party product and/or whether the Judicial Council will have to contract on its own for the product.*

*Please include a description of any products, features or other value-added components required to address this RFI. The response vendor must also provide proof that they have access to the third-party software source code (own or in escrow) and that the response vendor is able to provide long-term support for the third-party software components.*

[INSERT CONTENT HERE]

1. RFI Cost Data Estimate

*The FSO requests that response vendors provide RFI Cost Data Estimate by completing the “IT-2019-01-BD CAFM 2-0 RFI Pricing\_TEMPLATE.xlsx (Appendix III) file and submitting per the following instructions:*

*a)* One (1) Excel \*.xlsx file format electronic copy of the IT-2019-01-BD CAFM 2-0 RFI Pricing\_TEMPLATE.xlsx renamed by replacing “\_TEMPLATE” with Your-Company-Name followed by an underscore and a unique identifier (e.g. IT-2019-01-BD CAFM 2-0 RFI Pricing\_Your-Company-Name\_unique-identifier.xlsx”).

*b) One (1) Adobe \*.pdf file format electronic copy of the response vendor’s IT-2019-01-BD CAFM 2-0 RFI Pricing\_Your-Company-Name\_unique-identifier.pdf*

**Additional detail regarding RFI Cost Data Estimate, Appendix III, as follows:**

The response vendor may submit **multiple** Cost Workbooks as needed to provide the Judicial Council with different pricing options. At a minimum, one of the Cost Workbooks submit shall encapsulate and specifically address the needs of FSO’s CAFM 2.0 Requirement.

The Appendix III Cost Workbook must contain actual quantities and cost amounts for the response vendor’s solution. Costs should include firm pricing for all procurement items and a schedule/distribution of costs over a five (5) year period, including the deployment of all IWMS functional areas/modules as required and aligned with the sections herein Appendix I:

2.2 CAFM 2.0 - IWMS Solution Implementation Plan

2.3 CAFM 2.0 - IWMS Migration and Integration Plan and

5.0 Response Vendor Additional Plans of this document.

Attachment file IT-2019-01-BD CAFM 2-0 RFI Pricing\_TEMPLATE.xlsx (Appendix III), contains worksheets where response vendors may provide the details regarding the Solutions Pricing under the “Vendor Assumption / Notes / Comments” columns. The Cost Workbook requires the response vendor to select the “Software License” type and provide details under “Vendor Assumption / Notes / Comments” column, if the license is an “Enterprise” or “Other” type listed from the selection.

If the “Vendor Assumption / Notes / Comments” column cell requires more space to complete the response with exhibits, insert the contents in section (4.1 Vendor Solution Price / Cost Workbook) with a reference to the Line Item ID(s) and in the “Vendor Assumption / Notes / Comments” worksheet cell include a comment to see a detailed response\exhibit back to this section.

The Cost Workbook (IT-2019-01-BD CAFM 2-0 RFI Pricing\_TEMPLATE.xlsx) allows response vendors to include two solution software license options:

1. III-3 Software – Subscription
2. III-4 Software – Perpetual

**\*Note:** Please read ““**Judicial Council Assumptions/Notes:**” carefully in each worksheet.

[INSERT ADDITIONAL RESPONSE(S) TO APPENDIX III HERE]

* 1. Vendor Estimated Solution Price / Cost Workbook (Appendix III)

*The Judicial Council requests that response vendors to provide Estimated Pricing Data by completing the Appendix III Cost Workbook the file attachment IT-2019-01-BD CAFM 2-0 RFI Pricing\_TEMPLATE.xlsx*

*The Cost Workbook contains the following Worksheets for Vendors to provide their Response:*

| **Worksheet Title** | **Description** |
| --- | --- |
| Vendor Info | **Worksheet for Vendor** to provide Company information. Instructions for RFI Response Vendor on how to fill out this template. (*Although some of the information may be a duplicate of section 1.2 Company Overview of this document, this will insure the source of the response data*.) |
| III-1 Total Cost Summary | Summary of Vendors the total price information. (contains formulas, not intended for Vendor to alter) |
| III-2 Implementation | **Worksheet for Vendor** to provide Implementation Project Costs Break Down, based on CAFM 2.0 Requirement.xlsx. |
| III-3 Software - Subscription | **Worksheet for Vendor** to describe and itemize One-time and Ongoing Maintenance & Support costs for the application software - Subscription Pricing |
| III-4 Software - Perpetual | **Worksheet for Vendor** to describe and itemize One-time and Ongoing Maintenance & Support costs for the application software - Perpetual Pricing |
| III-5 Hosting Services | **Worksheet for Vendor** to describe and itemize all one-time and ongoing hosting services. |
| III-6 Labor Rates | **Worksheet for Vendor** to provide Hourly Rates and Blended Rate. |

*Completing the Cost Workbook in detail will assist the Judicial Council in understanding the response vendor’s Solution Pricing options for budgetary purposes in preparation for Judicial Council’s next generation Integrated Workplace Management System (IWMS) solution for implementation.*

{Optional} Print\Export all worksheet of your IT-2019-01-BD CAFM 2-0 RFI Pricing\_Your-Company-Name\_unique-identifier.xlsx to a \*.pdf file format and Insert Object file or both object files (\*.xlsx and \*.pdf) in this section.

[INSERT CONTENT HERE]

1. Response Vendor Additional Plans

*Provide Additional Solution Plan(s) for implementing and providing on-going Maintenance & Operation Support for the CAFM 2.0 Requirements. Providing this information may help the Judicial Council to determine if the response vendor will be invited to present and provide a demo of their Solution.*

* 1. CAFM 2.0 – IWMS Training Plan

*Provide details on response vendor’s strategy/approach for training Judicial Council’s staff to utilize and maintain the new Solution. Include estimated training hours for each IWMS Functional Domains and integration solutions, including estimated timeline (e.g. weeks or months), diagrams & Gannt charts, estimated number of resources required.*

[INSERT CONTENT HERE]

* 1. CAFM 2.0 – IWMS Testing Plan

*Provide details on the response vendor’s strategy/approach for testing the new Solution before the Production “Go-Live”. Address the tasks required to test all Solution environments, including estimated timeline (e.g. weeks or months), diagrams & Gannt charts, estimated number of resources required, assumptions, and resources required from the Judicial Council.*

[INSERT CONTENT HERE]

* 1. CAFM 2.0 – IWMS Maintenance and Operation Support Plan

*Provide details on the response vendor’s strategy/approach for the implementation of on-going Maintenance and Operation Support for the new Solution. Address the tasks required to support the Solution environments (e.g. Process and Procedures documentation, Change and Support Requests, Recovery Request, Ticketing System, etc.), including estimated timeline (e.g. weeks or months), diagrams and Gannt charts, estimated number of resources required, assumptions, and resources required from the Judicial Council.*

[INSERT CONTENT HERE]

1. RFI Response Checklist

*Please ensure you have included or addressed all the items below in your response to the RFI to be considered as a viable solution for the JCC.*

[ ]  RFI Response Template (Appendix I)

(File renamed in the format “IT-2019-01-BD CAFM 2-0 RFI Vendor Response\_*Your-Company-Name*.docx”)

[ ]  Title Page

[ ]  Cover Letter

[ ]  Included Response Vendor Company’s Name, Address, Telephone, and Fax numbers, and Federal identification number

[ ]  Included Response Vendor’s representative’s Name, Title, Address, telephone, and Email Address

[ ]  Table of Contents

[ ]  Executive Summary and Introduction

[ ]  Company Overview

[ ]  References

[ ]  Response Vendor’s Solution Overview

[ ]  CAFM 2.0 – IWMS Solution Offering

[ ]  CAFM 2.0 – IWMS Solution Implementation Plan

[ ]  CAFM 2.0 – IWMS Migration and Integration Plan

[ ]  Response Vendor Experience and Project Staff

[ ]  Solution Implementation Project Team and Support Staff description table.

[ ]  Business Solution Response to CAFM 2.0 Requirements

[ ]  File renamed in the format “IT-2019-01-BD CAFM 2.0 Requirement\_*Your-Company-Name*\_Response.xlsx” (Appendix II)

[ ]  Supporting Documentation

[ ]  RFI Cost Data

[ ]  Vendor Solution Price / Cost Workbook (Appendix III)

[ ]  File renamed in the format “IT-2019-01-BD CAFM 2-0 RFI Pricing\_*Your-Company-Name\_unique-identifier*.xlsx”

[ ]  File renamed in the format “IT-2019-01-BD CAFM 2-0 RFI Pricing\_*Your-Company-Name\_unique-identifier*.pdf”

[ ]  Response Vendor Additional Plans

[ ]  CAFM 2.0 – IWMS Training Plan

[ ]  CAFM 2.0 – IWMS Testing Plan

[ ]  CAFM 2.0 – IWMS Maintenance and Operation Support Plan

Electronic copies can be sent on a non-rewriteable flash drive or electronic submissions by email to solicitations@jud.ca.gov (the “Solicitations Mailbox”)

**END OF APPENDIX I**