

RFP Number: RFP-OCR23-154RB  
RFP Title: Power BI training services

# REQUEST FOR PROPOSALS

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***OFFICE OF COURT RESEARCH: BUSINESS  
MANAGEMENT SERVICES***

**REGARDING:**

RFP NUMBER: RFP-OCR23-154RB

RFP TITLE: POWER BI TRAINING SERVICES

**PROPOSALS DUE:**

*October 16, 2023*, NO LATER THAN 5 P.M. PACIFIC TIME

## 1.0 BACKGROUND INFORMATION

1.1 Judicial Council of California (“Judicial Council” or “JBE”), chaired by the Chief Justice of California, is the chief policy making body 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 JBE is the staff agency for the council and assists both the council and its chair in performing their duties.

The Judicial Council of California is seeking assistance in planning, designing, creating and implementing Power BI (Business Intelligence) Training solutions for California’s Trial and Appellate Courts, as well as specified JBE staff. The goal is to facilitate Power BI adoption for various ongoing projects and to be able to grow and maintain the BI environment at the local (court) level.

The selected vendor will be providing Power BI training services to support multiple initiatives. The training services include, but are not limited to:

1. Plan, design, and develop Power BI class curriculum suitable for learners of various skill and ability.
2. Deliver training through live, instructor-led webinars which will be recorded for future viewing by other members of the judicial branch.
3. Create training materials such as presentations, learning aids or videos for later reference.

**It is the intention of the JBE to award a single contract for Power BI Training for a one-year term.**

## 2.0 DESCRIPTION OF SERVICES AND DELIVERABLES

The JBE seeks the services of a person or entity with expertise in in planning, designing, creating and implementing Power BI Training solutions in support of the branch wide Power BI rollout for California’s Trial and Appellate Courts, as well as specified JBE staff.

The selected Contractor will lead this effort which the JBE expects to be fixed price and “turn-key.” The training solution must:

- Design and execute trainings along at least three tracks/courses to address training for these specific roles/student categories:

- **Casual users:** defined as a user who uses Power BI to view dashboards and needs to know the basic functions required to view, filter, and customize dashboard views.
- **Designers:** those who are charged with creating dashboards in Power BI and must understand data management, data governance, basic design principles, and Power BI functionality.
- **Administrators:** those who manage Power BI instances and who are charged with managing access, data governance, data flows, and basic Power BI functionality.

It is envisioned that there would be one training curriculum for the casual user and the administrator roles. For the designer, two classes must be developed: a “quick start” one-day boot camp class that focuses in on key concepts; and a longer, more detailed class that dives into the concepts more thoroughly.

- Provide JBE a complete list of all curricula and class content at least 30 business days prior to the date of the first training.
- Create a mutually agreed upon schedule with four or more sessions of each training type (total of four training types) offered over multiple months.
- At least one session of each type must be recorded and enabled for replay.
- Provide ready-to-use training materials and train-the-trainer materials for continued staff training of the dashboard and visualizations produced.
- Provide access to print and electronic materials, media, presentations, and learning aids as is customary in the provider’s course offerings at no additional charge.
- Provide appropriate course name, description, number of sessions for different group of users’ number of days and number of hours for each session.
- Manage all aspects of course registration, including registration, participant tracking, post-class satisfaction survey, and issuance of certificates of completion to participants who attend the entire sessions.
- Course content must cover all Power BI concepts and areas including, but not limited to, the following:

**Casual Users:**

- Basics of viewing and navigating Power BI and Power BI reports.
- Use of filters and slicers.
- Download the Power BI reports locally to excel.
- How to personalize Power BI visuals.
- Concept of tool tip and drill through.
- Bookmarking dashboard.

**Designers:**

- Analyze the business requirement and make decisions on the type of visualization (dashboard versus paginated reports)
- Design and develop reports using Power BI Report Builder
- Design and develop Power BI dashboard.
- Modifying and customizing an existing dashboard template.
- Connecting data sources to Power BI.

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- Transforming data (data cleaning).
- Role of Power Query Editor.
- Basics of DAX in Power BI desktop.
- Data Model (interaction between visuals).
- Creating measures.
- Concept of filtering in Power BI.
- Creating and publishing paginated reports and dashboards.

**Administrators:**

- Concept of Power BI Service
- Configure Power BI Gateways to facilitate a secure connection to the data sources.
- Connecting to source databases (example Oracle, SQL, HAN using Power BI Gateways
- Data governance and administration using workspaces.
- Deployment of dashboard/reports using data pipelines
- Assignment of User Access and Authorizations
- Maintaining data security around the dashboard/reports across the judicial branch

**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	September 27, 2023
Deadline for questions	October 4, 2023
Questions and answers posted ( <i>estimate only</i> )	October 9, 2023
Latest date and time proposal may be submitted	October 16, 2023
Evaluation of proposals, including interviews if needed ( <i>estimate only</i> )	October 17, 2023 – November 5, 2023
Notice of Intent to Award ( <i>estimate only</i> )	November 6, 2023
Negotiations and execution of contract ( <i>estimate only</i> )	November 6-20, 2023
Contract start date ( <i>estimate only</i> )	December 1, 2023

EVENT	DATE
Contract end date ( <i>estimate only</i> )	November 30, 2024

#### 4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (Non-IT Services)	These rules govern this solicitation.
Attachment 2: JBE Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must sign: this JBE 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 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: Darfur Contracting Act Certification	The Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.
<i>[Only for solicitations of \$100,000 or more]</i> Attachment 6: Unruh and FEHA Certification	The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification.
Attachment 7A & 7B: Payee Data Record	The Proposer must complete the Payee Data Record
Attachment 8; DVBE Bidder Declaration	The Proposer must complete the DVBE Bidder Declaration
Attachment 9: DVBE Declaration	The Proposer must complete DVBE Declaration

#### 5.0 PAYMENT INFORMATION

The resulting agreement shall be at firm fixed price PER PHASE. The ultimate contract price is a not-to-exceed amount. Payment will be disbursed utilizing a phased approach, with payments allocated equally at each phase.

Phase 1: curriculum development and registration process completed by February 16, 2024

Phase 2: Upon execution of four (4) trainings

Phase 3: Upon execution of eight (8) trainings

Phase 4: Upon execution of twelve (12) trainings

Phase 5: Upon execution of sixteen (16) trainings

Payment cannot be made until each phase is completed. Late performance will be subject to a penalty of delay of payment. This delay of payment will not exceed six (6) months after the late performance is provided. Late performance is defined as phase completion provided greater than two (2) weeks after the completion of a given phase. Inadequate performance will be subject to a penalty of a ten percent (10%) reduction in payment. Inadequate performance is defined as a service in any phase that does not include the criteria outlined in Section 2.0.

## **6.0 SUBMISSIONS OF PROPOSALS**

- 6.1 Proposals should provide straightforward, concise information that satisfies the requirements of the “Proposal Contents” section below. 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 technical proposal and the cost proposal.
  - a. The Proposer must submit the technical proposal signed by an authorized representative of the Proposer. The technical proposal must be submitted to the JBE to [solicitations@jud.ca.gov](mailto:solicitations@jud.ca.gov), separate from the cost proposal. The Proposer must write the RFP title and number on the email header.
  - b. The Proposer must submit the cost proposal signed by an authorized representative of the Proposer. The cost proposal must be submitted to the JBE to [solicitations@jud.ca.gov](mailto:solicitations@jud.ca.gov), separate from the technical proposal. The Proposer must write the RFP title and number on the email header.
- 6.3 Proposals must be sent and delivered via email by the date and time listed on the coversheet of this RFP to:  
  

[Solicitations@jud.ca.gov](mailto:Solicitations@jud.ca.gov)  
Judicial Council of California  
455 Golden Gate Avenue  
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 Technical Proposal. The following information must be included in the technical 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. 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.
- d. Names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Proposer has conducted similar services. The JBE may check references listed by the Proposer.
- e. Proposed method to complete the work.
- 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. The Proposer must complete the Darfur Contracting Act Certification (Attachment 5) and submit the completed certification with its proposal.

- iii. 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.
- iv. *[for solicitations of \$100,000 or more]* The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification (Attachment 6) and submit the completed certification with its bid.

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

- i. A detailed line-item budget showing total cost of the proposed services.
- ii. A full explanation of all budget line items in a narrative entitled “Budget Justification.”
- iii. 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 JBE reserves the right to negotiate extensions to this period.



## 9.0 EVALUATION OF PROPOSALS

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

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

CRITERION	MAXIMUM NUMBER OF POINTS
Quality of work plan submitted	30%
Experience on similar assignments	10%
Cost	30%
Credentials of staff to be assigned to the project	10%
Acceptance of the Terms and Conditions	10%
Ability to meet timing requirements to complete the project	10%

## 10.0 INTERVIEWS

The JBE *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 interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the JBE's offices. The JBE will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The JBE will notify eligible Proposers regarding interview arrangements.

## 11.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

PROPOSALS ARE SUBJECT TO DISCLOSURE TO THIRD PARTIES AND MEMBERS OF THE PUBLIC PURSUANT TO APPLICABLE LAWS, INCLUDING PUBLIC DISCLOSURE PURSUANT TO RULE 10.500 OF THE CALIFORNIA RULES OF COURT. Except as required by law, the JBE 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 may be disclosed in response to applicable public records requests, or as otherwise required by law. Such

disclosure may be made regardless of whether the proposal (or portions thereof) is marked “confidential,” “proprietary,” “copyright ©,” or otherwise, and regardless of any statement in the proposal (a) purporting to limit the JBE’s right to disclose information in the proposal, or (b) requiring the JBE 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. Submission of any proposal pursuant to this RFP constitutes acknowledgment and consent by the Proposer to the potential public disclosure of its proposal content, pursuant to this Section 12.0. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

## **12.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE**

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

Eligibility for and application of the DVBE incentive is governed by the JBE’s DVBE Rules and Procedures. Proposer will receive a DVBE incentive if, in the JBE’s sole determination, 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 is specified in Section 10.0 above.

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”).

If Proposer wishes to seek the DVBE incentive:

1. Proposer must complete and submit with its proposal the Bidder Declaration (Attachment 8). Proposer must submit with the Bidder Declaration all materials required in the Bidder Declaration.
2. 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 Proposer is itself a DVBE, it must complete and sign the DVBE Declaration. If 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.

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

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 JBE approves in

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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.

If using DVBE subcontractors, the Proposer must complete and return to the JBE a copy of the post-contract certification form (<https://www.courts.ca.gov/documents/JBCM-Post-Contract-Certification-Form.docx>), promptly upon completion of the awarded contract, and by no later than the date of submission of Proposer's final invoice to the JBE. If the Proposer fails to do so, the JBE will withhold \$10,000 from the final payment, or withhold the full payment if it is less than \$10,000, until the Proposer submits a complete and accurate post-contract certification form.

When a Proposer fails to comply with the post-contract certification requirement in this section and a payment withhold is applied to a contract, the JBE shall allow the Proposer to cure the deficiency after written notice. Notwithstanding the foregoing or any other law, if after at least 15 calendar days, but no more than 30 calendar days, from the date of the written notice the Proposer refuses to comply with the certification requirements, the JBE shall permanently deduct \$10,000 from the final payment, or the full payment if less than \$10,000.

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.

### **13.0 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 protest inadequate and non-responsive, and will result in rejection of the protest.

The deadline for the JBE to receive a solicitation specifications protest is the proposal due date. Protests must be sent to [solicitations@jud.ca.gov](mailto:solicitations@jud.ca.gov) and addressed to:

The Protest Officer  
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Judicial Council of California  
455 Golden Gate Avenue  
San Francisco, CA 94102