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| RC2 | REQUEST FOR PROPOSALS |
| **JUDICIAL COUNCIL OF CALIFORNIA**  **Regarding:**  *Facilities Services’ Integrated workplace management system (IWMS) ProjecT*  **RFP Number: RFP-FS-2019-04-LB**  **PROPOSALS DUE:**  *March 6th, 2020* no later than *5* p.m. Pacific time |

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1. **INTRODUCTION AND PURPOSE OF RFP**

The Judicial Council of California (“**JCC**” or “**Judicial Council**”) Facilities Services Office (the “FSO”) invites all interested software vendors and software implementation service providers (hereinafter, referred to as “vendor,” “proposer,” or “contractor”) with proven products and experience, to submit proposals to implement, license, host, support, and maintain an Integrated Workplace Management System (“IWMS”) for use by the Judicial Branch Entities. For purposes of this RFP, the “Judicial Branch” means the JCC, any California superior or appellate court, and the Habeas Corpus Resource Center.

The JCC, chaired by the Chief Justice of California, is the chief administrative and policy making agency of the California judicial system. The FSO is responsible for managing Judicial Branch’s real estate portfolio. The FSO manages ongoing operational needs for over four hundred and seventy-five (475) Judicial Branch facilities, as well as site selection and acquisition for new capital projects.

The primary goal of this RFP is to obtain vendor proposals that meet the JCC’s requirements for an IWMS using the proposer’s current solution and service offerings. During the RFP process, proposers may be invited to participate in an information exchange with Judicial Council staff, to present their solution in detail, and provide a product demonstration focused on the JCC’s key areas of interest.

* 1. **BACKGROUND INFORMATION**

The Judicial Branch’s current primary system is referred to as “CAFM”, a Computer Aided Facilities Management application utilized to manage the maintenance and real estate workload for the Judicial Branch’s portfolio. The first implementation of CAFM occurred in 2004 – 2005 utilizing the TRIRIGA 8.4 software product. The current implementation of CAFM substantially took place between 2008 - 2011 using TRIRIGA 9 and more closely mirrored organizational processes. This implementation is essentially the one in use today since no new functionality was implemented with the modules in use following a 2013 upgrade from TRIRIGA 9 to TRIRIGA 10. The Judicial Council’s CAFM Team has implemented fixes and enhancements from 2012 to the present 2020.

The FSO primarily uses CAFM to receive and authorize Service Work Orders (“**SWOs**”) for demand maintenance, preventive maintenance, and facility modifications from the courts and third-party service providers. The FSO processes an average of 6,110 SWO a month. There are currently 908 CAFM registered users, including the JCC, other Judicial Branch entities and service providers, that are authorized by or on behalf of JCC or another member of the Judicial Branch to use CAFM.

The FSO extensively configured and enhanced the original CAFM system to meet its business needs, and this has hindered its ability to take advantage of new technological advancements with application upgrades. For example, the system has been configured to accommodate a contractual provision that required that all performed firm fixed price Service Work Orders with a cost of under $2,000 be deducted from billings. Internally this functionality is referred to as the “**2K Deduct**.”

The “2K Deduct” and other customized configurations have impeded software upgrades to the latest version of TRIRIGA.

Instead of a single integrated system, the FSO currently uses approximately thirty (30) spreadsheets, databases, and separate software systems in conjunction with CAFM to meet its business needs. The FSO seeks a solution that will minimize redundancy by consolidating functionality into a single system for real estate and lease management, facilities management, maintenance management, project management, environmental compliance management and energy/resource management also known as sustainability.

# 2.0 DESCRIPTION OF GOODS AND/OR SERVICES

The JCC is requesting proposals from qualified vendors to provide a software-as-a-service solution (SaaS) and related implementation, support, training, and other professional services for an IWMS solution that meets the JCC requirements as defined in the Business and Technical Requirements (Exhibit 1). As an outcome of this RFP, the Judicial Council intends to one vendor with award a five (5) year initial contract term, with the JCC’s sole option to extend for an additional three (3) years following expiration of the initial five (5)-year term (“First Option”) and an additional two (2) years (“Second Option”) following expiration of the First Option for a maximum total contract term of ten (10) years.

The IWMS proposed by the vendor shall support the following operational objectives:

* Maintenance management for demand and preventative maintenance for California’s Courthouses and other Judicial Council facilities. Automation is needed for Work Order routing and processing. The majority of SWO requests are auto-forwarded to the third-party service providers. Higher dollar or more complex SWO requests require review by the Judicial Council staff.
* Real estate and portfolio management for owned and leased property. Support is needed for the full lifecycle of transactions including acquisition to disposition. A particular need is leasing functionality given that ninety-four (94) Court facilities are leased.
* Asset management for the building systems and vehicles. Tracking of permits, preliminary orders, and fines is needed.
* Energy/Resource management for utility costs, usage, and reporting.
* Environmental health & safety management for incident tracking, regulatory compliance and risk management.
* Quality assurance and quality compliance for plan reviews, permitting, and inspections management.
* Project management for capital and facilities modification projects including budgeting, funding sources, communications, reporting, etc.
* Provide the ability to integrate with other applications.
* Increase collaboration and enhanced communication between the JCC, the courts and third-party service providers.
* Migrate legacy data including all the portfolio, document, and lease data, and seven (7) years of transactional data from the existing system(s).
* Provide hosting for production and test environments.

# 3.0 TIMELINE FOR THIS RFP

The table below lists the key events related to this RFP. All dates are subject to change at the discretion of the Judicial Council.

| **EVENT** | **DATE** |
| --- | --- |
| RFP issued | 1/17/2020 |
| Deadline for questions due by 12:00 p.m. (PT). Submit to mail box [Solicitations@jud.ca.gov](mailto:Solicitations@jud.ca.gov) | 2/3/2020 |
| Questions and answers posted *(estimate only)* | 2/7/2020 |
| Latest date and time proposal may be submitted by 5:00 p.m. (PT) | 3/6/2020 |
| Anticipated Product Demonstration dates (see Section 11 for details) *(estimate only)* | 3/24/2020-4/1/2020 |
| Non Cost Technical proposals score posted at ***www.courts.ca.gov/rfps.htm*** *(estimate only)* | 4/6/2020 |
| Public opening of cost portion of proposals (Notice of time and location will be posted at [*www.courts.ca.gov/rfps.htm*](http://www.courts.ca.gov/rfps.htm) *(estimate only)* | 4/7/2020 |
| Evaluation of Cost Portion *(estimate only)* | 4/8/2020-4/10/2020 |
| Notice of Intent to Award *(estimate only)* | 4/14/2020 |
| Deadline to Submit Award Protest (JCC must receive award protest within 5 days of Notice of Intent to Award) *(estimate only)* | 4/21/2020 |
| Contract Negotiations (*estimate only*) | 4/22/2020-6/30/2020 |
| Contract start date (*estimate only*) | 7/1/2020 |
| Contract end date (initial terms) (*estimate only*) | 6/30/2025 |

# 4.0 RFP ATTACHMENTS AND EXHIBITS

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. Proposers shall follow the rules, set forth in Attachment 1, in preparation of their proposals. This attachment is for the proposer’s reference only and **does not need to be submitted** with the RFP response. |
| Attachment 2: JCC Master Agreement | If selected, as the winning bidder, the Proposer must sign the JCC’s Master Agreement (the “**Master Agreement**”). This attachment is for the Proposer’s reference only and **does not need to be submitted** with the RFP response. |
| Attachment 3: Proposer’s Acceptance of the Master Agreement | On this form, the Proposer must indicate acceptance of the Master Agreement or identify exceptions to the Master Agreement. If exceptions are identified, then Proposer must also submit (i) a red-lined version of Attachment 2 that clearly tracks proposed changes to the attachment; and (ii) written documentation to substantiate each such proposed change and why such change would be beneficial to the JCC. |
| Attachment 4: General Certifications Form | The Proposer must complete the General Certifications Form and submit the completed form with its proposal. |
| Attachment 5: Small Business Declaration | The 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: Iran Contracting Act Certification | The Proposer must complete this form and include it in the cost portion of their proposal ONLY if the proposal cost is over $1,000,000 (one million). |
| Attachment 8: Unruh and FEHA Certification | The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification and include this form in the non-cost proposal |
| Attachment 9: DARFUR Contracting Certification | The Proposer must complete and return this form with the non-cost proposal. |
| Attachment 10: Proposer Submission Questions Form | The Proposer must submit any questions regarding the RFP in this format. |
| Attachment 11: Qualifications Reference Sheet | The Proposer must submit this form, including any required documentation, in its non-cost portion of its proposal. |

The following Exhibits are included as part of this RFP:

| **EXHIBITS** | **DESCRIPTION** |
| --- | --- |
| Exhibit 1: Business and Technical Requirements | The Proposer must submit the complete Business and Technical Requirements response form with its non-cost proposal. |
| Exhibit 2: Statement of Work | The Proposer must submit the completed Statement of Work response with its non-cost proposal |
| Exhibit 3: Cost Workbook | The Proposer must fill out the various tabs in the Cost Workbook and submit with the Cost portion of the proposal. |
| Exhibit 4: Proposer Response Template | The Proposer must submit the completed Proposer Response Template with its non-cost proposal. |
| Exhibit 5: JCC Project Resources | Contains the JCC resources assigned to this project. |
| Exhibit 6: JCC Reports Requirement | Contains list of standard business reports from JCC |

# 5.0 PROPOSER’S QUESTIONS

Proposer questions regarding this RFP must be documented in the Proposer Submission Questions Form (Attachment 10) and sent to the Judicial Council Solicitations email box at [Solicitations@jud.ca.gov](mailto:Solicitations@jud.ca.gov) by the date and time listed in Section 3.0 of this RFP.

Proposer must indicate the document title, section and page number to which each of Proposer’s questions refer. All questions and answers will be posted on the Courts’ website at www.courts.ca.gov on the date indicated in Section 3.0.

Proposers are specifically directed NOT to contact any Judicial Council personnel or consultants for meetings or conferences in connection with the RFP at any time between the release of the RFP and any award and execution of a contract. Unauthorized contact with any Judicial Council personnel or consultants may be cause for rejection of the Proposer’s submitted proposal.

If Proposer believes that (a) Proposer’s question relates to Proposer’s confidential information and (b) disclosing such question would expose Proposer’s confidential information to its competitors, Proposer may submit the question in writing, clearly marking it as ‘Confidential’. Accompanying the question must be a statement explaining why the question is confidential. If the Judicial Council determines that the disclosure of the question or answer would expose confidential information, the question will be answered, and both the question and answer will be kept in confidence. Any material that a Proposer considers as confidential, but does not meet the disclosure exemption requirements of the California Public Records Act, should not be included in the Proposer’s Proposal, as it may be made available to the public.

If the Judicial Council determines that the question is not of a confidential nature, the question will not be answered, and the Proposer will be notified of the decision.

**6.0 PAYMENT INFORMATION**

6.1 Payments shall be made in accordance with the Master Agreement.

6.2 The JCC shall retain at least 10% of the total cost of milestone payments for professional services, payable upon final acceptance and go live.

# 7.0 SUBMISSIONS OF PROPOSALS

7.1 Proposer should respond to every section of this RFP, all attachments, and exhibits. A RFP Proposer Response template has been included for standardization of the responses (Exhibit 4). Proposers 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 nor desired. Emphasis should be placed on conformity to the RFP’s instructions and requirements, and completeness and clarity of content.

7.2 The Proposer must submit its proposal in two parts: the non-cost portion and the cost portion.

a. **Non-Cost Portion of the Proposal**: The Proposer must submit **one (1) original and fourteen (14) 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. The Proposer must write the RFP title and number and NON-COST PROPOSAL on the outside of the sealed envelope. Bidders must not include any pricing information at all in their Non-Cost Proposal.

b. **Cost Portion of the Proposal**: The Proposer must submit **one (1) original and fourteen (14) copies** of the cost portion of the proposal. 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. The Proposer must write the RFP title and number and COST PROPOSAL on the outside of the sealed envelope.

c. The Proposer must also submit an electronic version of the entire proposal on one (1) USB memory stick/flash drive. The drive should include a NON-COST file and COST file, and the files must be in one of these formats such as PDF, Word, or Excel.

1. Please use the following naming convention for the electronic files:

‘Abbreviated Name of the Company\_Non-Cost portion\_RFP-FS-2019-04-LB’

‘Abbreviated Name of the Company\_Cost portion RFP-FS-2019-04-LB’

d. The Proposer must provide proof, using the Qualifications Reference Sheet **(Attachment 11)** that they meet the minimum qualifications, listed below, before the proposal can be considered for further evaluation:

1. Successfully implemented an Integrated Workplace Management System (IWMS) for a minimum of two (2) organizations and within the last three (3) years. The number of users for each of the IWMS implementations must be 900 or more.
2. The Proposer shall have been in business for five (5) years or longer.

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

Attn: Bid Desk RFP-FS-2019-04-LB

Judicial Council of California

455 Golden Gate Avenue, 6th Floor

San Francisco, CA 94102-3688

7.4 Late proposals will not be accepted.

7.5 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.

# 8.0 PROPOSAL CONTENTS

8.1 **Non-Cost Portion**. 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.

The Proposer selected will need to be certified with the California Secretary

of State to do business in the State of California.

a. Proposer Information: Company name, address, telephone and fax numbers, and federal tax identification number.

b. Representative Name: 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. Company Overview and Financial Information.

d. Executive Summary.

e. Experience and Qualifications.

f. Response to Requirements.

g. Acceptance of the Master Agreement.

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 Master Agreement that implements all proposed changes, and (b) a written explanation or rationale for each exception and/or proposed change.

h. Certifications, Attachments, and Other Requirements.

1. 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 the Proposer is a California corporation, limited liability company (“**LLC**”), limited partnership (“**LP**”), or limited liability partnership (“**LLP**”), Proposer must submit proof that Contractor is in good standing in California. If the Proposer is a foreign corporation, LLC, LP, or LLP, and Proposer conducts or will conduct (if awarded the contract) intrastate business in California, Proposer must submit proof that Proposer is qualified to do business and in good standing in California. If the Proposer is a foreign corporation, LLC, LP, or LLP, and Proposer does not (and will not if awarded the contract) conduct intrastate business in California, Proposer must submit proof that Proposer is in good standing in its home jurisdiction.

iii. The Proposer must provide copies of the Proposer’s (and any subcontractors’) current business licenses, professional certifications, or other credentials.

iv. The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.

v. The Proposer must complete the Small Business Declaration form (Attachment 5) only if it wishes to claim the small business preference associated.

vi. The Proposer must complete the Payee Data Record (Attachment 6) in order to process payments.

vii. The Proposer must complete the Iran Contracting Act Certification (Attachment 7) and submit the completed certification with its proposal.

viii. The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification (Attachment 8) and submit the completed certification with its bid.

ix. The Proposer must complete the Darfur Contracting Act Certification (Attachment 9) and submit the completed certification with its proposal.

i. Third-Party Product(s). If applicable, provide details of third-party products, that are to be used with the IWMS.

8.2 **Cost Portion**. The following information must be included in the Cost portion of the proposal:

1. Proposers shall provide a firm fixed price in the format provided in Exhibit 3, “Cost Workbook.” Prices provided in any format or according to any structure that differs in any respect from the requested format provided in Cost Workbook will disqualify Proposer’s Proposal from consideration for an award.
2. Proposer shall use Exhibit 3, Cost Workbook, to propose all costs, fees, expenses, and pricing for this project. All tabs in the Cost Workbook must be completed. Any areas that require a cost in the Cost Workbook that are left blank will considered to be valued at zero costs ($0.00).
3. Costs should include firm pricing for all procurement items and a schedule of costs, aligned with the proposed project plan, to deploy all functional areas/modules.

**NOTE: It is unlawful for any person engaged in business within the state of California to sell or use any article or product as a “loss leader” as defined in Section 17030 of the Business and Professions Code.**

# 9.0 OFFER PERIOD

A Proposer's proposal will be deemed an irrevocable offer for 180 days following the proposal due date. In the event a final Master Agreement has not been awarded within this period, the Judicial Council reserves the right to negotiate extensions to this period.

# 10.0 EVALUATION OF PROPOSALS

The cost portion of proposals will be publicly opened at the date and time noted in Section 3.0 at the 3rd floor, Conference Center of the Judicial Council of California, San Francisco office.

The Judicial Council 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 Judicial Council will post an intent to award notice at <http://www.courts.ca.gov/rfps.htm>.

| **CRITERION** | **maximum number of points** |
| --- | --- |
| Experience and credentials of staff to be assigned to the project | 5 |
| Response to the business and technical requirements, and implementation approach/methodology | 60 |
| Cost of proposal based on firm fixed prices (Professional Services, Subscription Services, and additional services) | 35 |

# 11.0 PROPOSER PRESENTATIONS (SOLUTIONS DEMONSTRATIONS)

The Judicial Council will invite qualified Proposers for a presentation of their proposal, which will include interviews, demonstrations and proposed methodology approach with respective timeframes. Presentations are to clarify aspects set forth in the Vendor’s proposal and will require a demonstration of equivalence if a brand name is included in the specifications. The presentations will be conducted in person and held only at the Judicial Council’s Sacramento offices. No Proposers may present remotely. The Proposer's Key Personnel will need to be onsite for product demonstrations. Failure to attend will result in disqualification of the proposal. The Judicial Council will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The Judicial Council will notify qualified Proposers regarding interview arrangements.

# 12.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

Proposals are subject to disclosure requirements 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.

# 13.0 DISABLED VETERAN BUSINESS ENTERPRISE (“DVBE”) INCENTIVE

The Judicial Council has waived the DVBE incentive in this solicitation.

# 14.0 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.

To receive the small business preference, the Proposer must be either (i) a Department of General Services (“**DGS**”) certified small business or microbusiness 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 MISREPREPRETATION IN CONNECTION WITH THE SMALL BUSINESS PREFERNCE IS UNLAWFUL AND IS PUNISHABLE BY CIVIL PENALTIES. SEE GOVERNMENT CODE SECTION 14842.5.**

# 15.0 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. Protests must be sent to:

Attn: The Protest Officer, RFP-FS-2019-04-LB

Judicial Council of California, 6th Floor

455 Golden Gate Avenue

San Francisco, CA 94102-3688