



REQUEST FOR PROPOSALS, REVISION 1

ADMINISTRATIVE OFFICE OF THE COURTS

REGARDING:

Off the shelf registration software product configurable by user to enable full product functionality

RFP #CJER92013-LV

PROPOSALS DUE:

October 22, 2013 NO LATER THAN 4:00 P.M. PACIFIC TIME

1.0 BACKGROUND INFORMATION

1.1 The Judicial Council of California, chaired by the Chief Justice of California, is the chief policy making agency 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 Administrative Office of the Courts (AOC) is the staff agency for the Council and assists both the Council and its chair in performing their duties.

The Conference and Registration Services (CRS) group of the AOC's Center for Judiciary Education and Research (CJER) is tasked with maintaining a welcoming environment at the headquarters of the judicial branch of government, and ensuring professional, timely, cost-effective, and efficient event, meeting, and registration services for both on-site events at AOC conference centers and off-site programs at hotel and other meeting facilities.

2.0 DESCRIPTION OF GOODS AND/OR SERVICES

2.1 Conference and Registration Services (CRS) will favorably consider proposal responses from online registration service providers capable of providing the following features:

Services are expected to be performed by the selected online registration service provider November 25, 2013 through December 31, 2015 with three (3) one-year option terms to extend the agreement at 2013 cost. These option terms are defined as follows:

First Option Term: January 1, 2016 –December 31, 2017

Second Option Term: January 1, 2017 – December 31, 2018

Third Option Term: January 1, 2018 – December 31, 2019

The decision to exercise an Option Term will be at the CRS's sole discretion only.

Registration History:

In calendar year 2011 (January 1 – December 31, 2011) our total registrations were 7,500.

In calendar year 2012 (January 1 – December 31, 2012) our total registrations were 8,000.

Our projected total registrations for Calendar Year 2013 (January 1 - December 31, 2013) is 8,000.

Service Requirements:

- A. Support the Registration group of the Conference and Registration Services group/CJER at the Administrative Office of the Courts, located at 455 Golden Gate Avenue, San Francisco, CA.
- B. Upon request by the Supervising Coordinator, provide a defined number of software training sessions at the AOC office for key staff at no additional cost.
- C. Provide registration team staff a minimum of 48 hours advance notice for any changes and/or upgrades which may affect the user experience in any way, for the purposes of beta-testing, and possible announcement.
- D. Reply to customer support inquiries within sixty (60) minutes of request.
- E. Provide 20 hours of customer support each year at no additional cost.
- F. Assign/designate an experienced key account manager to the AOC account and provide user-friendly interface as needed.
- H. Provide capabilities in the form of the following:
 - a. **Event Registration Capabilities:**

Table 1:
M = Must Have
D = Desirable

Activity Title	Able to Provide	Unable to Provide	Must Have or Desirable	Explain
Online event registration capabilities for events of all size and types			M	
Pre-populate registrant profile information on registration forms			M	
Profile recognition for returning users			M	
Tracking of multiple profiles (more than one profile per person)			D	
Multiple customized forms including designated input fields			M	

Automated Waitlist			D	
Multiple Sub Accounts			D	
Allow registrants to sign-up guests			M	
Conditional logic for additional questions, agenda items, custom text			M	
Ability to upload presentations (such as logo's, bio's & other documents)			D	
Create registration paths based on customized registration types to accommodate application process (such as exhibitor, attendee, faculty, speaker)			M	
Capabilities to accept registrant modification or cancelations up until specified dates			M	
Accept PayPal payment collections & processing by secure data capture (with options for payment by check or credit)			D	
Unlimited user accounts at different levels			D	
Track accumulated workshop credits for continuing education			M	
Merge duplicate contacts into one contact record			D	
Badge printing ability direct from the system with integrated bar-coding for event check-in as well as session scanning			M	
Design and host calendar view of multiple upcoming events			D	
Ability to design and customize event website and pages			M	
Ability to create an independent survey			M	

site at no charge				
Ability to include Google map locations/directions on travel page (i.e. map local attractions, restaurants, airports, conference hotels).			D	
Meeting Venue Directory Search			D	
ASP Model for All Functions			M	
Scalability			M	

b. Provide Real-time reporting to include:

Table 2:

Activity Title	Able to Provide	Unable to Provide	Must Have or Desirable	Explain
Create unlimited custom reports, cross-event reports, snapshot reports (with time saving capabilities)			M	
Track Activity			M	
Save reports with pre-selected criteria			M	
Ability to create charts and graphs for presentations			D	
Quick access to most commonly run reports			M	
Print personal agendas			M	
Post-event survey's at no charge			D	
Gather feedback from attendees before event is completed			D	
Ability to extract reports on Excel			M	

c. Session management:

Table 3:

Activity Title	Able to Provide	Unable to Provide	Must Have or Desirable	Explain
Import Session details into Excel			M	
Clone or copy sessions and registration paths			M	
Allow set-up of maximum number of required sessions and/or participants			M	
Add session descriptions in text and HTML option			M	
Close session when needed			M	
Automate waitlists if needed per session			D	
Receive alerts in proximity of full session capacity			D	
Allow registrants to create their own customized agenda by session or activity			D	
Allow overlapping sessions if needed			D	
Deliver post event questions only to attendees of specific sessions			M	
Ask participants questions after sessions are chosen via logic			M	

d. E-Mail or Text Communication:

Table 4:

Activity Title	Able to Provide	Unable to Provide	Must Have or	Explain
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			Desirable	
Automatic e-mail confirmations based on registration status (such as incomplete registration notices, waitlists notifications, etc.)			M	
Choose “sent from” and “reply to” name per email address			M	
Tailor messaging to unlimited participants			M	
Schedule specific dates for email blasts			D	
Able to easily send personal agendas, confirmations, etc. in PDF form and easily readable on mobile device			D	
Ability to send multiple attachments			M	
Deliver confirmations and notifications to guests of registrants			M	
Automatic copy of allocated number of administrative staff on all emails to registrants (with designated choice)			M	
Save e-mail templates for re-use			M	
Run rendering test to see how well email works with various email programs			M	
Activate trigger-based cancellation and regret emails			D	
Set invitation reminders to repeat on specified dates for unresponsive invitees			D	
Tailor messaging to unlimited target lists			M	

e. Administrative Management:

Table 5:

Activity Title	Able to Provide	Unable to Provide	Must Have or Desirable	Explain
Multi-user access with defined user rights			M	
Provide client support 24 hours, 7 days a week (live phone) at no additional cost			M	
Customize dashboards for top-level view of event and contact data			D	
Import and export archive capabilities at no additional cost			D	
Migrating data capabilities			M	

f. Accounting requirements:

Table 6:

Activity Title	Able to Provide	Unable to Provide	Must Have or Desirable	Explain
Provide a per-registrant, multi-year fee structure rather than per event or profile.			M	
Provide monthly invoices for services provided reflecting the transactions from the previous month			D	
Ability to track usage (hours, number of registrations, etc.)			M	

g. Mobile Applications:

Activity Title	Able to Provide	Unable to Provide	Must Have or Desirable	Explain
Ability to provide mobile friendly registration forms			D	

Ability for attendees to create and manage personal event schedules with reminders & mobile calendar compatibility			D	
Ability to provide contact sharing and mobile chat options			D	
Full text search of sessions, exhibitors & speakers			D	
Ability to display schedules by day, speaker & track			D	
Ability to push notifications directly to attendees' devices				
Ability to conduct individual session evaluations			D	

Please list additional features your organization can provide which may further improve our registration service and that are not list on this technical document (you may attach additional pages if needed):

3.0 TIMELINE FOR THIS RFP

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

EVENT	DATE
RFP issued	<i>Friday, Sept 20, 2013</i>
Deadline for questions to Solicitations Mailbox at solicitations@jud.ca.gov	<i>End of Day Friday, September 27, 2013</i>
Submit request for WebEx to participate on -in Conference Call at solicitations@jud.ca.gov	<i>Monday, October 7, 2013 1:00 p.m.</i>
Pre-proposal WebEx -Conference Call	<i>Tuesday, October 8, 2013 2:00 p.m.</i>

<u>Deadline for questions from Pre-proposal Conference Call</u>	<u>Friday, October 11, 2013</u> <u>2:00 p.m</u>
Questions and answers posted from Solicitations Mailbox and Conference Call	<i>Tuesday, October 15, 2013</i>
Latest date and time proposal may be submitted	<i>Tuesday, October 22, 2013</i> <i>4:00 p.m. PST</i>
Anticipated interview dates (<i>estimate only</i>)	<i>Week of October 28, 2013</i>
Evaluation of proposals (<i>estimate only</i>)	Week of November 4, 2013
Public opening of cost portion of proposals	<i>Friday, November 1, 2013</i>
Notice of Intent to Award (<i>estimate only</i>)	<i>Week of November 11, 2013</i>
Negotiations and execution of contract (<i>estimate only</i>)	<i>Week of November 18, 2013</i>
Contract start date (<i>estimate only</i>)	November 25, 2013

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: AOC Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must accept the AOC’s Standard Purchase Order Terms and Conditions and the JBCL Appendix Terms and Conditions (the “Terms and Conditions”).
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: Payee Data Record Form	This form contains information the AOC requires in order to process payments and must be submitted with the proposal.

5.0 PRICING INFORMATION

I. Pricing Structure: Please indicate whether prices are annual, monthly or other.

Annual Registrants User Fee	Initial Option	First Option	Second Option	Third Option
	1+ year term	1 year term	1 year term	1 year term
7,000				
8,000				
9,000				
10,000				
Additional per user cost -if over contracted number of users				
Number of Complimentary Registration log-ins (for testing by Registration Staff). Please advise if by annual, per event or other.				
Additional Fees, If Any (Please Describe)	1+ year term	1 year term	1 year term	1 year term
Maintenance Fee				
License Fee				
Other Fees (please describe)				

6.0 PRE-PROPOSAL ~~WEBEX~~ CONFERENCE CALL

The AOC will hold a pre-proposal conference call on the date and time identified in the timeline above. The pre-proposal ~~WebEx~~ conference call phone number will be provided via the solicitations mailbox.

Attendance at the pre-proposal conference is optional. Proposers are strongly encouraged to attend.

7.0 SUBMISSIONS OF PROPOSALS

7.1 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.

7.2 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 six (6) copies** of the non-cost portion of the proposal. The original must be signed by an authorized representative of the Proposer. 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 six (6) copies** of the cost portion of the proposal. The original must be signed by an authorized representative of the Proposer. The original cost portion (and the copies thereof) must be submitted to the AOC in a single sealed envelope, separate from the non-cost portion. The Proposer must write the RFP title and number on the outside of the sealed envelope.

c. The Proposer must submit an electronic version of the entire proposal on CD-ROM. The files contained on the CD-ROM should be in PDF, Word, or Excel formats.

7.3 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
Fiscal Services Office, Business Services Unit
Attn: Nadine McFadden, RFP: CJER92013-LV
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.

- a. Proposer's name, address, telephone and fax numbers, and federal tax identification number. Note that if 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 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 Court may check references listed by Proposer.
- e. What level of data security, backup and disaster recovery do you offer to ensure integrity of customer and event data?
- f. What happens at the end of the contract? How do we get access to our data if/when we exit the contract? At what cost?
- g. Acceptance of the AOC Terms and Conditions.
 - i. On Attachment 3, the Proposer must either indicate acceptance of the Terms and Conditions or clearly identify exceptions to the Terms and Conditions. An "exception" includes any addition, deletion, or other modification.

- ii. If exceptions are identified, the Proposer must also submit a red-lined version of the Terms and Conditions that clearly tracks proposed changes, and a written explanation or rationale for each exception and/or proposed change.

- i. Certifications, Attachments, and other requirements.
 - i. Proposer must include the following certifications in its proposal:

Proposer certifies that it has no interest that would constitute a conflict of interest under California Public Contract Code sections 10365.5, 10410 or 10411; Government Code sections 1090 et seq. or 87100 et seq.; or rule 10.103 or rule 10.104 of the California Rules of Court, which restrict employees and former employees from contracting with judicial branch entities.

Proposer certifies that either (i) it is not a scrutinized company as defined in PCC 10490(b), or (ii) the goods or services the Proposer would provide to the Court are not related to products or services that are the reason the Proposer must comply with Section 13(p) of the Securities Exchange Act of 1934. (Note: PCC 10490(b) defines a “scrutinized company” as “a person that has been found to be in violation of Section 13(p) of the Securities Exchange Act of 1934 by final judgment or settlement entered in a civil or administrative action brought by the Securities and Exchange Commission and the person has not remedied or cured the violation in a manner accepted by the commission on or before final judgment or settlement.”)
 - ii. If (i) Proposer is a corporation, limited liability company, or limited partnership, and (ii) the agreement resulting from this RFP will be performed in California, proof that Proposer is in good standing and qualified to conduct business in California.

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

IT Services: As indicated in Section 5, Pricing Information

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.

9.0 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 AOC reserves the right to negotiate extensions to this period.

10.0 EVALUATION OF PROPOSALS

CRS 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 AOC will post an intent to award notice at www.courts.ca.gov/rfps.htm.

CRITERION	PERCENTAGE
Pricing	30%
Positive Business Reference	10%
Experience with Similar Clients (such as state or government organizations)	10%
Ability to provide technical features listed (scalability, reports requested, and security protocols) as well as any additional technical features not listed	30%
System-intuitiveness, ease of use (would need product demonstration in person or through WebEx)	20%
	100%

11.0 INTERVIEWS/DEMONSTRATIONS

The AOC will conduct interviews and demonstrations with potential Proposers to clarify aspects of their proposals. The interviews will be conducted in person. For in-person interviews, the location of the interviews will be held at 455 Golden Gate Avenue, San Francisco, CA 94102. The AOC will also consider a WebEx interview/demonstration. The potential Proposer will be notified of their scheduled time and the room and floor number for interview and demonstration. The AOC will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The AOC will notify eligible Proposers regarding interview arrangements.

12.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

One copy of each proposal will be retained by the AOC for official files and will become a public record. California judicial branch entities are subject to rule 10.500 of the California Rule of Court, which governs public access to judicial administrative records (see www.courtinfo.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10_500).

If information submitted in a proposal contains material noted or marked as confidential and/or proprietary that, in the AOC's sole opinion, meets the disclosure exemption requirements of Rule 10.500, then that information will not be disclosed upon a request for access to such records. If the AOC finds or reasonably believes that the material so marked is **not** exempt from disclosure, the AOC will disclose the information regardless of the marking or notation seeking confidential treatment.

Notwithstanding the above, the California Public Contract Code requires the public opening of certain proposals. If required to do so by the Public Contract Code, the AOC may disclose all information contained in a proposal, including information marked as confidential or proprietary.

13.0 DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION GOALS

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

14.0 PROTESTS

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract 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 AOC to receive a solicitation specifications protest is the proposal due date. Protests should be sent to:

Administrative Office of the Courts
Fiscal Services Office, Business Services Unit
Attn: Protest Hearing Officer, RFP: CJER92013-LV
455 Golden Gate Avenue, 6th Floor
San Francisco, CA 94102-3688

END OF RFP