TO:	POTENTIAL BIDDERS
FROM:	Administrative Office of the Courts Northern/Central Regional Office
DATE:	January 23, 2008
SUBJECT/PURPOSE OF MEMO:	To issue Addendum 1 to RFP 010708-NCRO and, as set forth in the attached documents: 1.) To publish the AOC's Responses to Bidders' Questions/Requests, for those questions/requests received as of January 22, 2008; 2.) To modify RFP Section I.3.2.1, Implementation; 3.) To modify RFP Section IV.6, Proposed Implementation Schedule; 4.) To modify RFP Section V.2.1, Prime Contractor Responsibility; Appendix C, Bid Response Forms, Form 5.1, Administrative Requirements Response Matrix; *and* RFP Appendix H, Master Service Agreement, 6.4, Subcontractors 5.) To modify RFP Section VI.3.3, Project Staff and Project Organization 6.) To modify RFP Appendix C, Bid Response Forms, Form 6.1, Minimum Qualifications Matrix *and* Form 6.2, Bidder Experience Reference Form
ACTION REQUIRED:	You are invited to review and respond to the Request for Proposals ("RFP"), as posted at http://www.courtinfo.ca.gov/reference/rfp/phoenix-rfp.htm
PROPOSAL DUE TO AOC:	Proposals must be received **by 1:00 p.m. on February 11, 2008**
SUBMISSION OF PROPOSALS:	Proposals must be sent to: Judicial Council of California Administrative Office of the Courts Attn: Nadine McFadden, RFP 010708-NCRO 455 Golden Gate Avenue, 7th Floor San Francisco, CA 94102

1.) See the AOC Response to Bidder Questions/Requests file dated January 23, 2008, at:

http://www.courtinfo.ca.gov/reference/rfp/phoenix-rfp.htm

2.) The following modifications shall be made in RFP Section I.3.2.1, Implementation:

Table I-3. Deployed Phoenix Courts for Trust Accounting/PSCD

Trial Courts	
~~Riverside~~San Bernardino San Diego	Stanislaus

3.) The following text shall be deleted from RFP Section IV.6, Proposed Implementation Schedule:

~~This implementation schedule will allow for the continued deployment of FI to the eight remaining courts (Los Angeles court will have limited functionality that will be replaced during full deployment), and to pilot three courts for Trust Accounting.~~

~~The change of the FM Update Profile from 101 to 102, introduction of the New GL, including new Chart of Accounts and review and update of the Enterprise Structure would be incorporated into the Upgrade Project.~~

~~The Grants Management and Budget Administration and Control modules are included in the upgrade as they are dependent on the FM Update Profile and New GL, and they are tightly integrated.~~

~~The Treasury component of Wave 2 is dependent on the application of Enhancement Pack 4, which in turn is dependent on an Upgrade Project. Therefore, it is necessary for this wave to follow the completion of the Upgrade Project.~~

~~The final wave, Wave 3, primarily consists of HR related functionality, which is not scheduled to be fully deployed to the courts until the end of 2011 along with some FI functionality. Therefore, due to timing and resource availability, it is advisable to begin this wave after HR deployment to additional courts, and the preceding FI functionality has been completely implemented.~~

~~Business Intelligence (BI) is shown as a separate bar covering the entire timeframe. As BI compliments the upgrade deployments, and occupies a separate, dedicated server, BI reporting will be implemented in parallel to all other activities.~~

~~The table below provides a summary of the functionality waves to be deployed if n the proposed Implementation Schedule.~~

~~Figure IV-3.Functionality Waves for the Proposed Implementation Schedule~~

~~Wave~~	~~Functionality~~
~~Wave 1~~	~~Asset Accounting~~ ~~Treasury (including SAP Enhancement Pack 4)~~ ~~Inventory Management~~
~~Wave 2~~	~~Grants Management (including billing component of Sales and~~

	~~Distribution)~~
	~~Budget Control System (BCS)~~
	~~Integrated Planning (IP)~~
	~~Position Budget Controlling (PBC)~~
~~Wave 3~~	~~e-Recruiting~~
	~~Performance Management~~
	~~Travel~~
	~~Personnel Cost Planning and Simulation (PCPS)~~
	~~Learning Solution (LSO)*~~
~~Business Intelligence (BI)~~	~~BI activities continue through to the end of HR deployment.~~

4.) The following modifications shall be made in RFP Section V.2.1, Prime Contractor Responsibility *and* RFP Appendix C, Bid Response Forms, Form 5.1, Administrative Requirements Response Matrix:

ADMINISTRATIVE REQUIREMENT 1: Bidder must agree to accept full Prime Contractor responsibility for coordinating and controlling all aspects of the contract and any Subcontractors. The Bidder must certify that Subcontractor(s) shall not exceed ~~20~~40% of the fees paid on a project basis, as stated in the Agreement (see Appendix H, Master Services Agreement (MSA) for specific requirements). The Bidder must check "Yes" on the Matrix provided as Form 5.1 in Appendix C, Bid Response Forms, indicating compliance, or "No" on the Matrix indicating non-compliance with the requirement.

In addition the following modification shall be made in RFP Appendix H, Master Service Agreement, 6.4, Subcontractors:

Unless otherwise agreed to in writing by the Parties, Contractor shall not subcontract more than twenty percent (~~20~~40%) of the Fees paid for a particular Project, on a Project-by-Project basis, to Contractor Agents.

See the revised files for RFP Appendix C, Bid Response Forms, and RFP Appendix H, Master Service Agreement, dated January 23, 2008, at:

http://www.courtinfo.ca.gov/reference/rfp/phoenix-rfp.htm

5.) The following modifications shall be made in RFP Section VI.3.3, Project Staff and Project Organization:

Table VI-3. Key Project Personnel

Key Personnel	Description / Minimum Functions
Program Director	The Bidder's Program Director must be an employee of the Bidder's firm and shall have the overall responsibility for the Bidder's project team. This individual reports directly to the AOC Phoenix Program Director. The Bidder's Program Director must be committed to the project, part-time from the contract origination date through Final Acceptance. Key responsibilities include but are not limited to: • Advise the AOC on business and risk issues related to the project • Responsible for overall quality of system integrator services • Review and approval of overall project plan, schedules, timeframes, and budget • Participant on Executive Steering Committee • Manage the QA review process and communications of the system integrator • Validate the effectiveness of resources, organizational structure and roles • Establish project/program standards and processes • Facilitate improvement in project processes and standards Key minimum mandatory qualifications include: • Program Director for SAP system integration project with a one time cost of twenty million dollars or more • A minimum of five (5) years experience as Program Director for SAP implementation projects

Key Personnel	Description / Minimum Functions
Project Manager	The Bidder's Project Manager must <u>be an employee of the Bidder's firm and shall</u> lead the Bidder's project team. This individual reports directly to the AOC Phoenix Program Director and Bidder's Phoenix Program Director. The Bidder's Project Manager must be committed to the project, full-time from the contract origination date through the beginning of the Support and Transition activity of Initial Release. Key responsibilities include but are not limited to: • Acting as the primary interface with the AOC Phoenix Program Management • Providing day-to-day management of the Project including overall performance and Contract compliance • Providing day-to-day management and direction of Contractor resources assigned to the Project • Managing the Project to the current work plans and coordinating the availability of scheduled resources to the Project • Managing all Project resources and ensuring that appropriate resources are available throughout the life of the Contract • Establishing and maintaining regular communications with the AOC Phoenix Program Office • Maintaining reporting, budget/cost reporting, and issue reporting, tracking, escalation, and resolution procedures • Practicing change management controls and procedures in coordination with the AOC • Monitoring and maintaining the development and implementation schedules • Developing and implementing a quality assurance process to ensure all objectives are met, milestones are achieved, and stakeholders are satisfied Key minimum mandatory qualifications include: • PMP or equivalent certification • Lead project manager for system integration project with a one time cost of twenty million dollars or more • A minimum of five (5) years experience as lead project manager for implementation projects • Public sector experience desirable

6.) The following modifications shall be made in RFP Appendix C, Bid Response Forms, Form 6.1, Minimum Qualifications Matrix *and* Form 6.2, Bidder Experience Reference Form:

Form 6.1 Minimum Qualifications Matrix[1]

Proposal Item	Vendor Agrees to Meet?		Prime Contractor and/or sub-contractor Name(s)	Reference to Proposal Response Section
Minimum Bidder Qualification Requirement 1: The Bidder shall have successfully implemented SAP HR/Payroll and Finance for a minimum of two large public sector agencies within the last three (3) years.~~The Bidder shall have implemented SAP HR/Payroll, Finance and Supplier Relationship Management for a minimum of five (5) years.~~	YES ☐	NO ☐		
Minimum Bidder Qualification Requirement 2: The Bidder shall have successfully implemented SAP HR/Payroll and Finance ECC 6.0 in a minimum of one organization (e.g. public sector or private).~~The Bidder shall have successfully implemented SAP HR/Payroll, Finance and Supplier Relationship Management for a minimum of two large public agencies within the last three (3) years.~~	YES ☐	NO ☐		
Minimum Bidder Qualification Requirement 3: The Bidder shall have successfully implemented the SAP HR/Payroll and Finance modules for a minimum of one public sector agency with an operating budget of at least $ 500 million.~~The Bidder shall have successfully implemented the SAP Finance modules for a minimum of two public agencies with an operating budget of at least $ 500 million each.~~	YES ☐	NO ☐		
Minimum Bidder Qualification Requirement 4: The Bidder shall have successfully implemented the SAP HR/Payroll and Time Collection in a minimum of two public sector agencies with at least 15,000 employees.~~The Bidder shall have implemented SAP HR/Payroll, Finance and Supplier Relationship Management ECC 6.0 in a minimum of two public sector agencies with an operating budget of at least $500 million each.~~	YES ☐	NO ☐		

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[1] The Minimum Bidder Qualifications shall be met by the Bidder through either the Prime Contractor and/or sub-contractors.

Proposal Item	Vendor Agrees to Meet?		Prime Contractor and/or sub-contractor Name(s)	Reference to Proposal Response Section
Minimum Bidder Qualification Requirement 5: The Bidder shall have successfully provided SAP post-implementation support services for a minimum of two public sector organizations.~~The Bidder shall have successfully implemented the SAP HR/Payroll and Time Collection in a minimum of two public agencies with at least 15,000 employees each.~~	**YES** ☐	**NO** ☐		
~~**Minimum Bidder Qualification Requirement 6:** The Bidder shall have successfully provided SAP post-implementation support services for a minimum of two public sector organizations.~~	~~YES ☐~~	~~NO ☐~~		

Form 6.2　　Bidder Experience Reference Form

Section 1. To be completed by the Bidder

Meets RFP Bidder Experience Requirement #: _____	
Project Information	
Bidder (Prime Contractor or sub-contractor) Name:	Bidder Contact/Name:
Project Dates:	Bidder Contact Phone:
Customer Organization:	Customer Contact Name:
	Customer Phone:
Customer Address:	Customer Fax:
Successfully implemented SAP HR/Payroll and Finance for a minimum of two large public sector agencies within the last three (3) years~~Implemented SAP HR/Payroll, Finance and Supplier Relationship Management for a minimum of five (5) years~~: ☐ Yes　　☐ No	
Successfully implemented SAP HR/Payroll and Finance ECC 6.0 in a minimum of one organization (e.g. public sector or private)~~Successfully implemented SAP HR/Payroll, Finance and Supplier Relationship Management in a large public agency within the last three (3) years~~: ☐ Yes　　☐ No	
Successfully implemented the SAP HR/Payroll and Finance modules for a minimum of one public sector agency with an operating budget of at least $ 500 million~~Implemented SAP HR/Payroll, Finance and Supplier Relationship Management ECC 6.0 in the public sector~~: ☐ Yes　　☐ No	
Successfully implemented the SAP HR/Payroll and Time Collection in a minimum of two public sector agencies with at least 15,000 employees~~Successfully implemented the SAP Finance modules for a public agency with an operating budget of at least $500 million~~: ☐ Yes　　☐ No	

Successfully provided SAP post-implementation support services for a minimum of two public sector organizations~~Successfully implemented the SAP HR/Payroll and Time Collection in a public agency with at least 15,000 employees~~: ☐ Yes ☐ No
~~Successfully provided post-implementation support services for SAP: ☐ Yes ☐ No~~

See the updated file for RFP Appendix C, Bid Response Forms, dated January 23, 2008, at:

http://www.courtinfo.ca.gov/reference/rfp/phoenix-rfp.htm

END OF ADDENDUM 1