



Judicial Council of California
ADMINISTRATIVE OFFICE OF THE COURTS

FINANCE DIVISION

455 Golden Gate Avenue • San Francisco, California 94102-3688
Telephone 415-865-7960 • Fax 415-865-4325 • TDD 415-865-4272

RONALD M. GEORGE
Chief Justice of California
Chair of the Judicial Council

WILLIAM C. VICKREY
Administrative Director of the Courts

RONALD G. OVERHOLT
Chief Deputy Director

STEPHEN NASH
Director, Finance Division

TO: POTENTIAL BIDDERS

FROM: Administrative Office of the Courts
Finance Division

DATE: **April 8, 2008**

SUBJECT/PURPOSE OF MEMO: REQUEST FOR PROPOSALS
Business Process Reengineering Training for CCMS

This RFP is for a qualified vendor that can provide a customized curriculum and onsite training on the topic of Business Process Reengineering (BPR). The training will be provided to the AOC Regional Program Office staff that are assigned to the California Court Case Management System (CCMS) at the AOC Southern Regional Office located in Burbank, CA.

ACTION REQUIRED: You are invited to review and respond to the attached Request for Proposals ("RFP"):

Project Title: Business Process Reengineering Training for CCMS
RFP Number: CCMS 07-02-RB

PROPOSAL DUE DATE: Proposals must be received by 1 p.m. on **April 22, 2008**

SUBMISSION OF PROPOSAL: Proposals must be sent to:
Judicial Council of California
Administrative Office of the Courts
Attn: Nadine McFadden, CCMS 07-02-RB
455 Golden Gate Avenue
San Francisco, CA 94102

FOR FURTHER INFORMATION: E-MAIL:
Solicitations@jud.ca.gov

TABLE OF CONTENTS

SECTION TITLE	PAGE
GENERAL INFORMATION	3
PURPOSE OF THIS RFP	4
RFP SCHEDULE AND GENERAL INSTRUCTIONS	4
SCOPE OF SERVICES.....	6
SPECIFICS OF A RESPONSIVE PROPOSAL	6
FEE PROPOSAL	7
RIGHTS.....	8
EVALUATION OF PROPOSALS	8
ADDITIONAL REQUIREMENTS.....	8
ADMINISTRATIVE RULES AND PROPOSED CONTRACT TERMS.....	8
CONFIDENTIAL OR PROPRIETARY INFORMATION	9

The following documents are incorporated into this Request For Proposals (RFP) by reference:

- Attachment A - Administrative Rules Governing Request For Proposals
- Attachment B - Terms and Conditions
- Attachment C - Technical Proposal
- Attachment D - Fee Proposal
- Attachment E - Contract Exceptions
- Attachment F - CCMS Fact Sheet and Press Release
- Attachment G - Payee Data Record

1.0 GENERAL INFORMATION

1.1 Background

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.

1.2 California Court Case Management System (CCMS)

The California Court Case Management System (CCMS) is a statewide technology initiative to bring the trial courts together to use one application for all case categories. The project is being managed by the Administrative Office of the Courts (AOC) Southern Regional Office in Burbank with the participation of the AOC Information Services Division in San Francisco. The design and development is being lead by five Superior Courts -- Sacramento, Orange, Ventura, San Diego and Los Angeles. Other involved courts are San Francisco, Monterey, Riverside, and San Bernardino Superior Courts.

A primary goal of the CCMS project is to make the courts “venue transparent,” which would give court users and the public the ability to conduct court business from any location in California. In addition, the following CCMS specific project goals support the strategic plan of California’s judicial branch of government:

- Support courts of all sizes and demographics.
- Manage system enhancements, especially those that arise from legislative changes.
- Maximize the benefits of automation by standardizing court business processes.
- Establish standard procedures that will make it easy for courts to use a common solution with minimum customization.
- Utilize a common approach for all case categories based on “best practices,” a contemporary architecture and continued technology evolution.
- Integrate with state and local justice partners, and state administrative systems.
- Facilitate application ownership through a vendor to state transition to produce cost benefits that result from state ownership and statewide maintenance and support.
- Ensure reasonable development times and demonstrated capacity to succeed, i.e., deployment and production in a court environment.
- Maximize economies of scale and leverage shared resources.

2.0 PURPOSE OF THIS RFP

The AOC seeks to identify and retain a qualified training service provider to present three days of customized training in the area of business process reengineering (BPR) for up to 25 participants. The customization of the curriculum will include selecting examples, exercises and tools that may best be applicable to the CCMS project, and if necessary, compressing the course into a three-day course. Additional information about the CCMS project can be found in Attachment F, CCMS Fact Sheet.

This RFP is the means for prospective service providers to submit their qualifications to the AOC and request selection as a service provider.

3.0 RFP SCHEDULE AND GENERAL INSTRUCTIONS

3.1 The AOC has developed the following list of key events from RFP issuance through notice of contract award. All key dates are subject to change at the AOC's discretion.

EVENT	Key Dates
Issue RFP	April 8, 2008
Deadline for Proposer Requests for Clarifications or Modifications	April 14, 2008
AOC Posts Clarification / Modification Response (estimated)	April 15, 2008
Proposal Due Date and Time	1:00 p.m. April 22, 2008
Notice of Intent to Award (estimated)	April 24, 2008
Execution of Contract (estimated)	May 2, 2008

3.2 The RFP and any addenda that may be issued will be available on the following website:

<http://www.courtinfo.ca.gov/reference/rfp/> ("Courtinfo website")

3.3 Proposal Submittal Address:

Nadine McFadden
RFP# CCMS-07-02-RB
Judicial Council of California
Administrative Office of the Courts
455 Golden Gate Avenue, 7th Floor
San Francisco, CA 94102-3688

3.4 Request for Clarifications or Modifications

3.4.1 Vendors interested in responding to the solicitation may submit questions by e-mail only on procedural matters related to the RFP or requests for clarification or modification of this solicitation document, including questions regarding the Terms and Conditions in Attachment B, to the Solicitations mailbox referenced below. If the vendor is requesting a change, the request must set forth the recommended change and the vendor's reasons for proposing the change.

Solicitations mailbox: solicitations@jud.ca.gov

3.4.2 All questions and requests must be submitted by email to the Solicitations mailbox no later than the date specified in Section 3.1, RFP Schedule and General Instructions. Questions or requests submitted after the due date will not be answered.

3.4.3 All email submissions sent to the Solicitations mailbox **MUST** contain the RFP number and other appropriate identifying information in the email subject line. In the body of the e-mail, always include paragraph numbers whenever references are made to content of this RFP. Failure to include the RFP number as well as other sufficient identifying information in the email subject line may result in the AOC taking no action on a vendor's email submission.

3.4.4 Without disclosing the source of the question or request, the AOC Contracting Officer will post a copy of the questions and the AOC's responses on the Courtinfo website.

3.4.5 If a vendor's question relates to a proprietary aspect of its proposal and the question would expose proprietary information if disclosed to competitors, the vendor may submit the question in writing, conspicuously marking it as "CONFIDENTIAL." With the question, the vendor must submit a statement explaining why the question is sensitive. If the AOC concurs that the disclosure of the question or answer would expose proprietary

information, the question will be answered, and both the question and answer will be kept in confidence. If the AOC does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the vendor will be notified.

4.0 SCOPE OF SERVICES

- 4.1 Services are expected to be completed by June 23, 2008 on three successive Mondays, excluding May 26, 2008.
- 4.2 Webinars and other methods of distance learning are not acceptable methods of delivering the training – the instructor must deliver the training on-site in Burbank, CA in a classroom style presentation for up to 25 participants.
- 4.3 Participants attending the course will have learned:
 - a general understanding of models, tools, and best practices for BPR
 - how to document processes
 - how to create "to be" processes
 - analysis of processes in order to identify and address gaps
- 4.4 The service provider will also:
 - 4.4.1 Meet with project directors and managers in order to discuss how curriculum can be customized to benefit the CCMS project team.
 - 4.4.2 Submit customized curriculum and class materials for approval by project manager and use during the training
 - 4.4.3 Provide all course materials for up to 25 participants.

5.0 SPECIFICS OF A RESPONSIVE PROPOSAL

- 5.1 Responsive proposals should provide straightforward, concise information that satisfies the requirements noted above. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the state's instructions, requirements of this RFP, and completeness and clarity of content.
- 5.2 Proposals shall be submitted in the following manner:
 - One printed and signed hard copy
 - Three copies of the printed and signed hard copy. The printed hard copies of the Proposal must be signed by a representative of the company, including name, title, address, e-mail address, and telephone number of one individual who is the company's designated representative.
 - One CD containing all proposal files.

5.3 Bidders must complete and submit the following documents in its proposal:

- Attachment C – Technical Proposal
- Attachment D – Fee Proposal
- Attachment E – Contract Exceptions, and
- Attachment G – Payee Data Record

5.4 The following information shall be included as the technical portion of the proposal:

- 5.4.1 Name, address, telephone and fax numbers, and federal tax identification number. Note that if a sole proprietorship using its social security number is awarded a contract, the social security number will be required prior to finalizing a contract.
- 5.4.2 Resumes describing the background and experience of key staff, as well as each individual's ability and experience in conducting the proposed activities.
- 5.4.3 Examples of the standard curriculum, a proposed table of contents that would cover the topics over a 3-day training course, an example of a tool and handout.
- 5.4.4 Describe key staff's knowledge of the requirements necessary to complete this project.
- 5.4.5 Names, addresses, and telephone numbers of a minimum of five (5) clients for whom the consultant has conducted similar services. The AOC may check references listed by the consultant.
- 5.4.6 Overall plan with time estimates for completion of all work required.

5.5 Failure of the proposer to comply with the requirements set forth in this Section may result in the proposal being deemed non-responsive to the RFP and being rejected.

6.0 FEE PROPOSAL

- 6.1 The estimated range for this project is between \$20,000 and \$25,000, inclusive of any travel and allowable expenses.
- 6.2 Proposers must submit a separate document of the proposal which includes the service provider's proposed fee schedule. It is expected that all service providers responding to this RFP will offer the service provider's government or comparable favorable rates.

6.3 The fee proposal must be inclusive of all personnel, materials, computer support, travel, lodging, per diem, and overhead rates to complete and deliver the services and work of in this RFP.

6.4 The method of payment to the consultant will be a lump sum firm fixed amount. However, for evaluation purposes, proposers must submit a break-out of the costs as specified in Attachment D, Fee Proposal.

7.0 RIGHTS

Proposers awarded a contract will have no ownership right in any of the forms produced or revised under the requirements of the contract contemplated by this RFP and the proposer cannot copyright them. The AOC reserves the right to develop and make available for public use all translated forms, documents, and text at no cost to the public.

8.0 EVALUATION OF PROPOSALS

Proposals will be evaluated by the AOC using the following criteria, in order of descending priority:

- a. Quality of work plan and samples submitted
- b. Experience on similar assignments
- c. Reasonableness of Fee proposal
- d. Credentials of staff to be assigned to the project
- e. Ability to meet timing requirements to complete the project

9.0 ADDITIONAL REQUIREMENTS

9.1 It may be necessary to interview prospective service providers to clarify aspects of their submittal. If conducted, interviews will likely be conducted by telephone conference call. The AOC will notify prospective service providers regarding the interview arrangements.

10.0 ADMINISTRATIVE RULES AND PROPOSED CONTRACT TERMS

10.1 Incorporated in this RFP, and attached as Attachment A, is a document entitled "Administrative Rules Governing Requests for Proposals. Bidders shall follow these rules in preparation of their proposals.

10.2 Contracts with successful firms will be signed by the parties on a State of California Standard Agreement form and will include terms appropriate for this project. Generally, the terms of the contract will include, but are not limited to the terms and conditions in Attachment B of this RFP

11.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

The Administrative Office of the Courts policy is to follow the intent of the California Public Records Act (PRA). If a vendor's proposal contains material noted or marked as confidential and/or proprietary that, in the AOC's sole opinion, meets the disclosure exemption requirements of the PRA, then that information will not be disclosed pursuant to a request for public documents. If the AOC does not consider such material to be exempt from disclosure under the PRA, the material will be made available to the public, regardless of the notation or markings. If a vendor is unsure if its confidential and/or proprietary material meets the disclosure exemption requirements of the PRA, then it should not include such information in its proposal.