

# REQUEST FOR PROPOSALS

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**REGARDING:**

**JUDICIAL BRANCH POWER BI TRAINING**

*RFP IT-2021-17-DM Power BI Training*

**PROPOSALS DUE: FEBRUARY 25, 2021**

NO LATER THAN **2:00 PM** PACIFIC TIME

## 1.0 BACKGROUND INFORMATION AND PURPOSE FOR THIS REQUEST FOR PROPOSALS (“RFP”)

Judicial Council of California (“Judicial Council” or “JCC”), 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 Judicial Council 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 Training solutions in support of the branch wide Power BI rollout for California’s Trial and Appellate Courts, as well as specified JCC staff. The goal is to facilitate Power BI adoption for the various ongoing projects and be able to maintain the BI environment at the local level.

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

1. Plan, design, develop and administer training in Power BI
2. Delivery of training will be through instructor led webinars
3. Multiple sessions will be arranged to accommodate attendee availabilities
4. Sessions will be recorded for future viewing by other members of the judicial branch
5. Creation of training materials such as presentations, learning aids or videos for later reference

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

## 2.0 DESCRIPTION SERVICES

- A. The selected Contractor will lead this effort which the JCC expects to be fixed price and “turn-key”. **The training solution must:**
- Provide training during normal working hours (Monday - Friday, 8am to 5pm, Pacific Time) through webinars for the users.
  - Provide course with a limit of **60 students per student category** as stated below.
  - There must be 3 tracks/courses to address training for these specific roles/student categories:
    - Casual users
    - Designers

- Admins
  - Provide a list of dates available for the training so the JCC staff can review for accommodation of employees.
  - Sessions must be enabled for the JCC to be recorded and replayed.
  - Provide JCC IT a complete list of all curricula and class content five (5) business days prior to the training.
  - 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.
  - Course content must cover all Power BI concepts and areas including, but not limited to, the following:
    - Basics of viewing and navigating Power BI (Casual users)
    - Connecting to data bases (Admins and Designers)
    - Creating and publishing dashboards (Designers)
  - Provide training and facilitate understanding in the practical application of Power BI based on real-world scenarios using case studies, customer projects, or similar paradigms for software systems development and IT infrastructure implementation projects.
- B. The selected Contractor will provide support for the following project activities:  
 Planning, design, development, implementation of the Power BI Training.

### 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	January 22, 2021
Deadline for questions to: <a href="mailto:solicitations@jud.ca.gov">solicitations@jud.ca.gov</a>	<b>February 11, 2021</b> <b>no later than 2:00 PM (PT)</b>
Questions and answers posted ( <i>estimate only</i> ) <a href="http://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a>	February 18, 2021
Latest date and time proposal may be submitted	<b>February 25, 2021</b> <b>no later than 2:00 PM (PT)</b>

EVENT	DATE
Anticipated interview dates ( <i>estimate only</i> )	March 3 – 8, 2021
Evaluation of proposals ( <i>estimate only</i> )	March 9 -17, 2021
Non-Cost proposals scores posted at <a href="http://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a> ( <i>estimate only</i> )	March 18, 2021
Notice of time and location of public opening of cost portion of proposals will be posted at <a href="http://www.courts.ca.gov/rfps.htm">www.courts.ca.gov/rfps.htm</a> ( <i>estimate only</i> )	March 22, 2021
Public opening of cost portion of proposals ( <i>estimate only</i> )	March 24, 2021 at 10 A.M. (PT)
Notice of Intent to Award ( <i>estimate only</i> ) Deadline to Submit Award Protest (JCC must receive award protest within 5 days of Notice of Intent to Award)	March 30, 2021
Negotiations and execution of contract ( <i>estimate only</i> )	March 30, 2021 – April 30, 2021
Contract start date ( <i>estimate only</i> )	May 1, 2021
Contract end date ( <i>estimate only</i> )	April 30, 2022

#### 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: Judicial Council Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must sign a Judicial Council of California Standard Agreement containing these terms and condition (the “Terms and Conditions”). If exceptions are identified or additional provisions proposed, the Proposer must also submit a redlined version of the Terms and Conditions that clearly identified the benefit to the Judicial Branch from the proposed changes and provides a written explanation or rational for each proposed change.

ATTACHMENT	DESCRIPTION
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: Payee Data Record Form	This form contains information the JBE requires in order to process payments and must be submitted with the proposal.
Attachment 6: Darfur Contracting Act Certification	The Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.
Attachment 7: Unruh Civil Rights Act and California Fair Employment and Housing Act Certification	The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification and submit the completed certification with its proposal.
Attachment 8: Small Business Declaration	The Proposer must complete this form only if it wishes to claim the small business preference associated with this solicitation.
Attachment 9: Bidder Declaration	Complete this form only if the Proposer wishes to claim the DVBE incentive associated with this solicitation.
Attachment 10: DVBE Declaration	The Proposer must complete this form and submit it with their proposal only if Proposer wishes to qualify for the DVBE incentive.

## 5.0 PAYMENT INFORMATION

See Attachment 2, Judicial Council Standard Terms & Conditions, Appendix B, Pricing and Payment.

The Judicial Council will not pay late fees; standard business payment terms are net sixty (60) days.

## 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, requirements, clarity and completeness of content.
- 6.2 The Proposer **must submit its proposal in two parts** with associated attachments, the Technical Proposal and the Cost Proposal.

- a. **Technical Proposal** – The Proposer must submit their Technical Proposal as an attachment to an email sent to [solicitations@jud.ca.gov](mailto:solicitations@jud.ca.gov).
  1. The Technical Proposal must be signed by an authorized representative of the Proposer.
  2. The Proposer must indicate on the subject line of the submission email the RFP title and also indicate the RFP number and title on the Proposal attachments.
- b. **Cost Proposal** - The Proposer must submit their Cost Proposal as an attachment to an email sent to: [RFP-IT02021-17-DM-COSTS@jud.ca.gov](mailto:RFP-IT02021-17-DM-COSTS@jud.ca.gov).
  1. The Cost Proposal must include all components required in the below **Section 7.2**, Cost Proposal.
  2. The Proposer must indicate on the subject line of the submission email the RFP title and number and also indicate the RFP number and title on the Proposal attachments.
- c. Submission acceptance will be based on the date and time the emails are received by the Judicial Council. Both emails must be received prior to the due date and time or the proposal will not be accepted.

## 7.0 PROPOSAL CONTENTS

7.1 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. 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. Please note the below given qualifications while preparing the resume:

1. Must have at least
    - a. Three (3) years' experience in designing and developing training services for Microsoft Power BI
    - b. Three (3) years' experience in designing and developing descriptive and predictive analytics dashboards and reports using Power BI
  2. Preferably, key personnel designing and developing the solution possess certifications in the corresponding area: Microsoft certified Power BI educator
  3. Project Manager must have at least five (5) years' experience in performing similar project management responsibilities.
  4. Expertise in building
    - a. BI Solutions using MS-Power BI
      - i. Design and development of descriptive and predictive analytics dashboards and reports
      - ii. Publishing and distribution of reports & dashboards to end users, constrained by the access roles.
      - iii. Integrating Power BI with third party data sources (i.e. Snowflake, Microsoft SQL server, Data lakes etc.)
  5. Expertise in business analysis, project management in a state government setup, preferably judicial system.
- d. Names, addresses, and telephone numbers of a minimum of five (5) 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.
- i. Training calendar, curricula and class content
  - ii. User categories with estimated proficiency levels
  - iii. Training channels/medium
  - iv. Workshops
  - v. Materials for later playback
- 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 (a) a red-lined version of the Terms and Conditions that implements all proposed changes, and (b) 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. 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.
  - iii. Proof of financial solvency or stability (e.g., balance sheets and income statements).
  - iv. The Proposer must complete the Darfur Contracting Act Certification (Attachment 6) and submit the completed certification with its proposal
  - v. The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification (Attachment 7) and submit the completed certification with its bid

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

IT Services:

- i. Provide pricing structure for the Course with a limit of 60 students per student category below. The courses should be designed keeping the following student categories in mind:
  - Casual users
  - Designers
  - Admins
- ii. Provide Cost structure with the ability to add additional sessions for different student category listed above as required.
- iii. A “not to exceed” total for all work and expenses payable under the contract, if awarded. The proposer’s total cost/fees for providing services set forth in this RFP Section 2.0 above shall be



inclusive of all costs including, but not limited to personnel, materials, computer support, travel, lodging, per diem, and overhead rates.

**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

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.

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

The cost portion of proposals will be publicly opened at the date and time noted in **Section 3.0**.

Inquiries on the exact venue may be inquired at [solicitations@jud.ca.gov](mailto:solicitations@jud.ca.gov) no earlier than the day after the latest date and time proposal may be submitted.

If a contract will be awarded, the JBE will post an intent to award notice at [www.courts.ca.gov/rfps.htm](http://www.courts.ca.gov/rfps.htm).

CRITERION	MAXIMUM NUMBER OF POINTS
Quality of work plan submitted and Proposer's understanding of the problem or needs (Section 2.0).	25
Experience on similar assignments	5
Cost	50
Credentials of staff to be assigned to the project	4

CRITERION	MAXIMUM NUMBER OF POINTS
Acceptance of the Terms and Conditions	7
Ability to meet timing requirements to complete the project	6
DVBE	3

**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 by phone or using video conferencing tools. The JBE will notify eligible Proposers regarding interview arrangements.

**11.0 CONFIDENTIAL OR PROPRIETARY INFORMATION**

**PROPOSALS ARE SUBJECT TO DISCLOSURE PURSUANT TO APPLICABLE PROVISIONS OF THE CALIFORNIA PUBLIC CONTRACT CODE AND RULE 10.500 OF THE CALIFORNIA RULES OF COURT.** 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 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 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. 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 Judicial Council’s DVBE Rules and Procedures. Proposer will receive a DVBE incentive if, in the Judicial Council’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 9.0 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:

- Proposer must submit with its proposal a DVBE Declaration (**Attachment 10**) 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.
- Proposer must complete and submit with its proposal the Bidder Declaration (**Attachment 9**). Proposer must submit with the Bidder Declaration all materials required in the Bidder Declaration.

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

If this solicitation is for IT goods and services, the application of the DVBE incentive may be affected by application of the small business preference. For additional information, see the Judicial Council’s Small Business Preference Procedures for the Procurement of Information Technology Goods and Services.

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 Judicial Council approves in 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.

**FRAUDULENT MISREPRESENTATION 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 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 JBE’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 JBE’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 8**). 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 JBE 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 MISREPRESENTATION IN CONNECTION WITH THE SMALL BUSINESS PREFERENCE IS UNLAWFUL AND IS PUNISHABLE BY CIVIL PENALTIES. SEE GOVERNMENT CODE SECTION 14842.5.**

#### **14.0 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: **February 22, 2021**. Protests must be sent to:

Judicial Council of California  
Branch Accounting and Procurement, Administrative Division  
Attn: Protest Hearing Officer, RFP Number: **IT-2021-17-DM**  
455 Golden Gate Avenue, 6th Floor  
San Francisco, CA 94102-3688

***END OF RFP***