

RFP Title: *Microsoft Office 365 System Integration and Implementation Services*
RFP Number: *2017-03*

REQUEST FOR PROPOSALS

**SUPERIOR COURT OF CALIFORNIA
COUNTY OF SANTA BARBARA**

REGARDING:

*Microsoft Office 365
System Integration and
Implementation Services*

PROPOSALS DUE:

February 27, 2017 NO LATER THAN *3:00* P.M. PACIFIC TIME

Statement of Work

1.0 BACKGROUND INFORMATION

1.1 The Superior Court of California, County of Santa Barbara ("JBE" or "Court") is seeking proposals from qualified vendors for Microsoft Office 365 System Integration and Implementation Services. The scope of the project includes on-premise Microsoft Active Directory (AD) integration and migration from an on-premise Exchange 2007 environment to Office 365 hosted email services for approximately 350 user mailboxes.

The Court is seeking a qualified Microsoft partner to assist with the following migration:

- **Microsoft Exchange 2007 to Hosted Exchange/Office 365**

2.0 DESCRIPTION OF GOODS AND/OR SERVICES

The awarded vendor will assist the Court in developing a migration plan, assisting with the environment setup and making recommendations. The goal is to provide a seamless transition to Microsoft Office 365. The Court has an existing Microsoft Enterprise Enrollment (O365 G3) and has 3 days of planning services available. The Court intends to apply the Microsoft planning services entitlement to this engagement to the extent possible.

The Court prefers a solution that will allow a gradual migration, with the intent to preserve access to calendars and shared resources throughout the migration. The Court is seeking expertise in a recommended strategy for the migration, but based on initial research, would like consultation on the following:

- 2.1 Migrate Users from on-premise Exchange 2007 to on-premise Exchange 2010 or Exchange 2013 as an initial step (if required).
- 2.2 Tenant Setup Including Exchange Online, OneDrive and SharePoint. The basic setup has been completed, but assistance is required for default settings and custom configuration.
- 2.3 Single domain routing design (for co-existence)
 - A. Set up Active Directory (AD) integration for Office 365 Cloud (likely using DirSync)
 - B. Develop migration path and recommend a migration procedure (i.e., 10 users). Migration to include, e-mail (incl. attachments), contacts (GAL), calendars, tasks, and notes.
- 2.4 Recommendation for migration path for public folders.
- 2.5 Recommendation for migration path and procedure for smart phones.
- 2.6 Recommendation for clean-up and decommission of the Exchange 2007 server (and subsequent conversion to an Exchange 2013 hybrid, if applicable).

3.0 COURT TECHNICAL ENVIRONMENT

- 3.1 Domain Controllers - 2008 Functional Mode
 - A. 3- Windows 2008 R2

- 3.2 Exchange 2007 SP3 with all current rollups on Windows Server 2003 R2
 - A. PST files
 - B. 4 mailbox databases
 - C. 400GB Data – Some users with 20+ GB mailboxes

- 3.3 507 PCs
 - A. Windows 7 Professional with Office 2013 Pro Plus
 - B. Exchange ActiveSync/OWA connected phones
 - i. Apple iOS
 - ii. Android

- 3.4 Mail Boxes
 - A. 350 Users/Distribution Lists
 - B. Email enabled public folders

End of Statement of Work

4.0 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	<i>February 10, 2017</i>
Deadline for questions	<i>February 17, 2017</i>
Questions and answers posted	<i>February 22, 2017</i>
Latest date and time proposal may be submitted	<i>February 27, 2017 3:00 PM PST</i>
Evaluation of proposals (<i>estimate only</i>)	<i>February 28, 2017</i>
Public opening of cost portion of proposals	<i>March 1, 2017</i>
Notice of Intent to Award (<i>estimate only</i>)	<i>March 8 2017</i>
Negotiations and execution of contract (<i>estimate only</i>)	<i>March 9-14, 2017</i>
Contract start date (<i>estimate only</i>)	<i>March 27, 2017</i>
Contract end date (<i>estimate only</i>)	<i>June 30, 2017</i>

5.0 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: JBE Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the "Proposer") must sign a JBE Standard Form agreement containing these 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. Note: A material exception to a Minimum Term will render a proposal non-responsive.
Attachment 4: General Certifications Form	The Proposer must complete the General Certifications Form and submit the completed form with its proposal.
Attachment 5: Bidder/Contractor Questionnaire	The Proposer must complete the Bidder/Contractor Questionnaire Form and submit the completed form with its proposal.
Attachment 6: Small Business Declaration	The Proposer must complete this form only if it wishes to claim the small business preference associated with this solicitation.

6.0 PAYMENT INFORMATION

- A. Payment terms will be specified in any agreement that may ensue as a result of the RFP.
- B. **THE COURT DOES NOT MAKE ADVANCE PAYMENT FOR SERVICES.** Payment is normally made based upon completion of tasks as provided in the contract between the Court and the selected Proposer. The Court may withhold ten percent of each invoice until receipt and acceptance of the final deliverable. The amount of the withhold may depend upon the length of the project and the payment schedule provided in the contract between the Court and the selected Proposer.

7.0 PRE-PROPOSAL CONFERENCE

No pre-proposal conference is needed for this procurement.

8.0 SUBMISSIONS OF PROPOSALS

- 8.1 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.
- 8.2 The Proposer must submit its proposal in two parts, the non-cost portion and the cost portion.

- a. The Proposer must submit the non-cost portion of the proposal electronically to sbsolicitation@sbcourts.org. The proposal must be signed by an authorized representative of the Proposer. The non-cost portion of the proposal must be in PDF, Word, PowerPoint or Excel formats. The non-cost portion of the proposal must be submitted to the JBE separate from the cost portion. The Proposer must write the RFP title and number on email subject line.

The Vendor is solely responsible for ensuring that the non-cost portion of the Bid is submitted via the sbsolicitation@sbcourts.org email, prior to the submission deadline date and time specified.

If the Vendor encounters and problems in submitting the non-cost portion of the bid electronically, please contact the Procurement Contact at 805-882-4674.

The Court is not responsible for and accepts no liability for any technical difficulties or failures that result from conducting business electronically. The Court shall have no obligation to any vendor unless or until the Court and the vendor fully execute a final and definitive contract negotiated between the parties.

- b. The Proposer must submit **one (1) original and three (3) 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 JBE 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.

- 8.3 The cost portion of the proposal must be delivered by the date and time listed on the coversheet of this RFP to:

Superior Court of Santa Barbara County
Procurements
1100 Anacapa Street, 2nd Floor
Santa Barbara, CA 93101

- 8.4 Late proposals will not be accepted.
- 8.5 Cost proposals must be sent by courier service (e.g. FedEx), or delivered by hand. Cost Proposals may not be transmitted by fax or email.

9.0 PROPOSAL CONTENTS

- 9.1 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 or attachments may be deemed non-responsive.
 - A. Submit one (1) completed copy of the Bidder/Contractor Questionnaire with any and all applicable attachments requested therein.

B. Proposed method to complete the work.

- i. Description of proposed techniques, approaches, and methods to be used in performing the services, including a listing of all specifications contained in the RFP's Statement of Work for which Proposer shall supply to the Court under any contract awarded under this RFP (e.g., model numbers, warranty information).

9.2. Acceptance of the Terms and Conditions.

- A. 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.
- B. 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.
- C. **Note:** A material exception to a Minimum Term will render a proposal non-responsive.

9.3. Certifications, Attachments, and other requirements.

- A. The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.
- B. 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.
- C. Copies of the Proposer's (and any subcontractors') current business licenses, professional certifications, or other credentials.
- D. Proof of financial solvency or stability (e.g., balance sheets and income statements).

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

IT Services:

- A. A detailed line item budget showing total cost of the proposed services.
- B. A full explanation of all budget line items in a narrative entitled "Budget Justification."
- C. A "not to exceed" total for all work and expenses payable under the contract, if awarded.

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.

10.0 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.

11.0 EVALUATION OF PROPOSALS

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

Procurements
Superior Court of Santa Barbara County
1100 Anacapa Street, 2nd Floor
Santa Barbara, CA 93101

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.

If a contract will be awarded, the JBE will post an intent to award notice at www.sbcourts.org.

CRITERION	MAXIMUM NUMBER OF POINTS
<i>Quality of work plan submitted</i>	<i>25%</i>
<i>Experience on similar assignments</i>	<i>25%</i>
<i>Cost</i>	<i>50%</i>

12.0 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 interview process may require a demonstration. The interview may also require a demonstration of equivalence if a brand name is included in the specifications. The interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the JBE's offices. The JBE will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The JBE will notify eligible Proposers regarding interview arrangements.

13.0 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.

14.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE

- A. Qualification for the Disabled Veterans Business Enterprise (DVBE) incentive is not mandatory. Failure to qualify for the DVBE incentive will not render a proposal non-responsive.
- B. Eligibility for and application of the DVBE incentive is governed by the Court's DVBE Rules and Procedures. Proposer will receive a DVBE incentive if, in the Court's sole determination, Proposer has met all applicable requirements. If Proposer receives the DVBE incentive, the dollar amount of its proposal will be reduced (for evaluation purposes only) by an amount equal to 3% of the lowest responsible proposal, not to exceed \$50,000.
- C. To receive the DVBE incentive, at least 3% of the purchase order 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").
- D. If Proposer wishes to seek the DVBE incentive:
 - i. Proposer must complete and submit with its proposal, the DVBE Proposer Declaration. Proposer must submit with the DVBE Proposer Declaration all materials required in the DVBE Proposer Declaration.
 - ii. Proposer must also submit with its proposal, a DVBE Declaration 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.

- E. Failure to complete and submit these forms as required will result in Proposer not receiving the DVBE incentive. In addition, the Court may request additional written clarifying information. Failure to provide this information as requested will result in Proposer not receiving the DVBE incentive.
- F. 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 Court's Small Business Preference Procedures for the Procurement of Information Technology Goods and Services.
- G. If Proposer receives the DVBE incentive: (i) Proposer will be required to complete a post-purchase order DVBE certification if DVBE subcontractors are used; (ii) Proposer must use any DVBE subcontractor(s) identified in its proposal unless the COURT 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.
- H. **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 Military & Veterans Code section 999.9.**

15.0 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 6). 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.

16.0 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 JBE to receive a solicitation specifications protest is **February 27, 2017**. Protests must be sent to:

Darrel E. Parker
Superior Court Executive Officer
312 East Cook Street
Santa Maria, CA 93454