

## **Judicial Branch PROCUREMENT OPPORTUNITY**

TO: Bid/Proposal Manager

FROM: Supreme Court of Illinois / Administrative Office of the Illinois Courts

DATE: December 14, 2018

SUBJECT: Request for Proposal (RFP): Registration, Conference, Event Management Application

### Brief Description:

On behalf of the Supreme Court of Illinois, the Administrative Office of the Illinois Courts (AOIC) is seeking to contract with a vendor for the design and development of a conference / event management and registration application, which includes event planning, participant sign-up and authentication, participant registration, participant transcript / event history reporting, various other reporting / event administrative functions, and an integrated Learning Management System (LMS). The application can be a commercial / off-the-shelf application customized for use or an in-house developed application. The AOIC is requesting proposals from responsible vendors to meet the AOIC's needs and time line. If you are able to meet these requirements, we would welcome a proposal.

This solicitation is to work with the Supreme Court's Judicial College and AOIC to design, develop, and deliver a functional conference / event management and registration application. The application is intended to operate on the AOIC's existing Oracle database platform and not require new hardware, software or server infrastructure. Alternately, a third-party hosting proposal will be considered (see section below). The conference / event management and registration application is to provide robust event planning and registration procedures which will allow authorized users access to scheduled events, curriculum, and historical information. Reporting and search capabilities should include user-defined filters and sorting tools. The security roles and access system should prevent users from searching for information that they are not authorized to access. As well, searches should not be allowed to consume high levels of processing cycles which prevent the registration and event management application from operating properly. Event planning and administration functions are to be included to allow the administration of events managing logistical, technology, and event / room capacity planning as defined in this RFP and the resulting requirements document.

An existing conference management application is currently in operation. This project includes the migration of all data from this application to the new registration and conference / event management application, including events, participants, attendance records, and personal profile information.

Prefer, registration and event management application that includes an integrated Learning Management System (LMS) to host and deliver online courses.

The vendor is to use an agile process of development, where iteratively, small segments of the Registration and Conference / Event Management application are delivered to run from the AOIC's database platform, where users are able to review and provide feedback for additional changes and acceptance throughout the entire project. This will allow constant feedback and revisions from users as they are frequently exposed to and have the ability to test the application. It is critical that the Registration and Conference / Event Management application be compatible with mobile devices as well as all standard computer browsers.

### Training

The Registration and Conference / Event Management application is to include help screens that describe workflows, screen functions, and field-level help. The vendor is to provide WebEx training to Judicial College members and AOIC staff on the use of the Conference / Event Management and registration application.

### Time line

A fully functional Registration and Conference / Event Management application is to be delivered and operational by June 30, 2019.

The vendor's ability to deliver an approved Registration and Conference / Event Management application for production use in a timely manner is critical. The proposal will need to identify the number of programming staff and resources needed to meet the AOIC's schedule. The vendor is expected to adjust the number of development staff to meet this time line.

Proposal Requirements / Pricing Proposal (under separate cover)

The vendor is to submit a fixed price proposal to meet the deliverables defined in this RFP. Upon execution of a contract between the AOIC and vendor, the selected vendor will have three (3) weeks to work with the Judicial College and AOIC to create a Project Requirements Document which defines and details the functionality of the Registration and Conference / Event Management application. If the requirements document significantly changes the vendor's cost proposal, the vendor is able to submit revisions to its cost and staffing proposal to meet the time line and requirements defined in the Requirements Document. Upon approval by the AOIC for all revisions to the proposal, the contract may need to be amended.

The vendor is expected to include support and application revisions for an additional 90 days from the full acceptance of the production Conference / Event Management application. In addition, the proposal is to include an hourly rate the AOIC may use for an additional block of hours for future ongoing enhancements.

A pricing proposal is to be provided in separate cover from the vendor's proposal.

The term of the contract will extend through December 30, 2019, with invoices being accepted for agreed upon milestones / deliverables identified in the project plan.

Upon selection of a vendor, the AOIC anticipates proceeding immediately to execute a contract for the agreed upon services. To expedite that review, a copy of the AOIC's Standard Vendor Agreement for Goods and Services, Bid Certification, W-9 form, and other documents are available on the Court's website.

Conference / Event Management application - Proposals:

- 1) Proposals are due Monday, January 14, 2019. Given the specific time line requirements, proposal extensions will not be favored.
- 2) Vendor Conference will be scheduled and offered via teleconference: To-be determined.
- 3) Proposals are to include:
  - a. The information identified in this RFP, including a project plan, programming resources provided, and time line to deliver a functional Conference / Event Management application by June 30, 2019.
  - b. Cost proposal (under separate cover).
  - c. AOIC Vendor Bid Certification
  - d. Vendor's completed W-9 form.
- 4) Description of the vendor's experience in application development projects.
  - a. Background of company and experience of development staff involved in this project.
- 5) Following vendor selection and execution of a contract, the selected vendor will have 3 weeks to develop a requirements document and submit revisions to its RFP proposal for costs and staffing to meet the needs defined in the requirements document.

## Conference / Event Management Requirements / Functionality

### Registration Features and Functions

1. Registration tool for all Judicial College and other events require planning and registration to:
  - a) meetings;
  - b) in-person courses;
  - c) online live webinars
  - d) online self-paced courses
2. Log-in accessible from the Internet, such as the Judicial College website:
3. Log-in and User Account features
  - users must create a new login account
  - users assigned a unique account number
    - ✓ faculty category needed
    - ✓ Faculty numbers are separate from other user numbers (#1 user & # 1 faculty user)
  - Unlimited ability to self-manage changes to account username and password
    - ✓ forgot username, forgot password prompts
  - Inactivate user id after predetermined number of days
  - Unlimited ability to self-manage account updates: contact information, user profiles, badge names, meal restrictions, etc.
    - ✓ Update of contact information should be independent of registration records.
    - ✓ Currently, event attendance records and transcripts are automatically updated when a user's contact information is updated failing to preserve the integrity of historical data, therefore, unlink profiles.
  - customized user fields and profiles (i.e. different fields for different users: Judge, GAL, non-judicial judicial branch staff, court administrator, probation, etc.)
4. Logging of all updates / changes to include User, Date and Time
5. Event pre-authorization
  - Third Party Registration feature that allows third party to register participants under user's email allowing pre-authorization of course registration.
  - Flexibility to designate courses that require pre-authorization
  - Flexibility to limit courses to a specific user type (judges, Circuit Clerks, etc.)
  - Faculty numbers are separate from other user numbers (#1 user & # 1 faculty user)
6. Faculty registration
  - Recognition of user as faculty from sign-on and event association
  - Ability to register as a participant for events in addition to faculty role for one or more sessions
7. Participant Registration
  - Flexible management of registration
    - a) Calendar Management
    - b) Group registration
    - c) Course Changes and Cancellations
    - d) Course Automatic email acknowledgements
    - e) Changes to User profiles, password/username
    - f) Ability to Delete "saving" feature for registration.
    - g) Option for user to add finalized event to User's calendar (google or outlook, etc.)
    - h) Ability to print or download event registration
    - i) Live/real time course capacity updates
    - j) Links to Lodging, lodging guidelines, etc.
    - k) Links to materials and resources, contact info, faculty bio's etc.
    - l) Auto-emails confirming registration

### On Site Registration and Attendance Records

1. Workflow to automate and support Self-Registration module at a kiosk for events (see website links in email)
  - Self-check-in
  - Ability to modify schedule
  - Ability to print, email schedule
  - Badge Management: Print Badges on Demand (barcoded badges)
  - Print, email, final transcript
  - Attendance Management: Provide attendance and registration data and analytics
    - View in real time
  - Kiosk Check-In vs. staff supported check-in

- Participant search by name, email, confirmation number, or scan barcode/QR code
    - Customize check-in process to preferred look and feel
  - Reporting and Analytics
2. Module to allow 'Self check-in' at events using scanners to identify session rooms and participant
    - a. Attendee, event session number, and confirmation of attendance must integrate with system
  3. Event Planning
    - a. Event Calendar
    - b. Event Budget Tracker (meals, audio visual, meeting room rental, lodging, technology)
    - c. Space / Room Setup
    - d. Marketing and Social Promotion

### **Administrative Features**

1. Flexibility to manage events and session updates
2. Manage open and close event dates
3. Real time access to data
4. Personal profiles and registration data should not override historical data and person records- currently, updates to person records also updates historical records  
i.e., if I changed a deceased judges record to invalid, his attendance history was deleted
5. Automate and customize emails to users

### **CMA – Current Conference Management Application functionality**

Build functionality of existing Conference Management application into new Registration and Conference / Event Management Application.

1. Administrative Event Set-up and Session Set-up
  - Changes needed:
    - a. Expand Character Limitations
    - b. Ability to customize Faculty and Participant Credit calculations
    - c. Ability to update individual sessions as needed, regardless of registration
    - d. Ability to customize "session type" General credits, Professional Responsibility credits, type of PR credits, etc.
    - e. No waiting list
    - f. Flexibility to assign Venue Name and Session Room Name
      - Info should print on Itinerary
    - g. Ability to create headers for Overall Flexibility to manage Event Set-Up and Sessions Set-Up
    - h. Authorization of Participants would be managed by participant Managers not AOIC
    - i. Assign Discussion Groups with sort capability by selected identifiers
    - j. Do not need mail tracking
    - k. Better Icons for Faculty and Session Descriptions
    - l. Font control - fonts are too small (6-8 point)

### **CMA – Event Dashboard**

1. Provide Administrative Overview of all Events
  - See Current Features (print screen)
  - Delete Option to Save a Registration
  - Change "Finalize" to "Registered"
  - Delete "Registered But Did Not Attend"
  - Delete Reception, Lunch and Breakfast
2. Move Calendar to the main page before User log in
  - Option to access calendar view
3. Option to Sort Events by Name and Year, etc.

## **CMA Post Conferencing Tab**

### Attendance Processing Field

Maintain features

### Review Attendance Field

Maintain features

### Event Evaluations Field

1. Delete this option
2. Will substitute another software program to generate course evaluations and link evaluation to Course
3. Need to preserve current data and transfer current data
4. Valid vs Invalid; active vs inactive

### Maintenance Field

1. Change Judge/Persons to Person or User
2. Delete "College" "Gender" from Maintenance Dashboard
3. Person Details (change to user details)
  - o Delete gender and college
  - o Leave organization
  - o Change Bench Assignments to "Area of Experience" or something akin to this
  - o Delete Specialty
  - o Addresses:
    - a. User will provide primary address and denote if it is home or work
    - b. Delete address nature field
    - c. Delete valid vs invalid for addresses
    - d. Keep modification time stamp
    - e. Allow administrative updates as well as user updates
4. Delete Edit Function of Districts, Counties, and Circuits
5. Titles: Need Flexibility to Customize Titles – by User or Administratively
  - a. Allow selection of title from Drop Down list or ability to customize and save title
6. Hotels: Keep feature, but update room selection features
7. Help/Text Entry: Delete
8. Address Types: Delete
9. Set-Up Items: Delete
10. Judicial Branch Level – Delete (should be a field in user account set-up)
11. Session Roles:

## **Reports Tab**

1. Reconcile Events page under Event Management Tab with Events under Reports Tab: delete one
2. Judges Person – merge details with Addresses
3. Delete Person Titles and Person Status under Reports Tab
4. Delete Dietary Restrictions Event Needs and Provide info by Person not by Event
5. Delete Sessions
6. Change Hotels to Venue – Keep as a Report
7. Hotel Room – Change to Venue Meeting Room
  - o Add Set-Up Description as an option
8. Pre-Formatted Reports
  - o Badges
    1. 5392 = Avery Badge insert
    2. Smaller Barcode to create more badge space
    3. More text lines
    4. Ability to customize Badge Names, Title, other details not saved in User Contact Information
    5. Ability to Save Badge Data separate from User Contact Information
    6. Delete Exclude feature
  - o Delete Conference Room Set-Up Needs

- Reconcile Event – Session Report and Event Room/Session Report
- Reconcile Faculty List and Faculty Roster
- Itinerary Report
  1. Itinerary reports should only be available pre-event
  2. Post Event – only Transcripts should be available
- Reconcile Judicial Detail Transcript and Judicial Summary Transcript
  1. Offer Transcript via Email or Print
  2. Offer Transcript options:
- Summary Transcript (title, date, type (faculty or attendee) and total credits including a breakdown of general and professional responsibility
- Detailed Transcript (that in addition to above, shows all of the courses (sessions) offered during an event, including general or professional responsibility credits, etc.)
- 3. Rename Special Credits “Professional Responsibility”
  - Allow option to identify one or more types of Professional Responsibility course
    - a. Diversity and Inclusion
    - b. Procedural Fairness
    - c. Professionalism
    - d. Civility
    - e. Judicial Wellness
    - f. Mental Health
    - g. Substance Abuse
- 4. Change Automatic Credits to “General”
- Delete Mailing Labels
- Reconcile Faculty List and Participant List, Session Roster and Participant Rosters
  - a. Create one Event Level Roster with options to add/delete field
  - b. Create one Session (Course) Level Roster with option to add/delete fields
    - i. add/exclude fields, or sessions per event
    - ii. edit header
    - iii. order names – last name first, or vice versa
    - iv. add bar codes to the left of names, if needed
    - v. separate Faculty from Participants in alpha order
    - vi. add faculty to the participant list
- Delete “Person/Judge Attendance Report” – reconcile with similar report

## **Technical Requirements**

Application must be written to operate on the AOIC's existing Oracle database platform and software versions.

The AOIC's database platform is not directly available from the Internet. However, using proxy services and other security techniques, the Conference / Event Management application is to be available from the Internet.

The user registration / authentication process is to include the following:

- Two-factor authentication using e-mail and user id / password.
- New user automated registration and account assignment.
- Automated password administration, such as 'Forgot Password' and 'Forgot ID'.
- Ability for users to update their respective account profile / information.
- Logging of user id's: created, modified, security changes.
- Support for activation of a Password Policy:
  - o Minimum password length
  - o Allows for complex passwords
  - o Requirement of a password change term and procedure
  - o Ability to inactivate user accounts if unused for a period of time.
  
- Creation and administration of security roles to be assigned to users.

### **Oracle Database Environment**

- The Conference / Event Management application is expected to be written in Apex and operate on the AOIC's database platform.
- Oracle Database Appliance, virtual manager, Oracle Advanced Security,
  - o Three (3) independent application platforms (development, test, and production)
- Oracle Enterprise Database and WebLogic v12.2
- Oracle Apex v4.2

All source code and documentation for this project will belong to the AOIC and is to be delivered, upon request and as the application modules are delivered.

### **Alternative – Third-party Hosting Services**

Although not a requirement for the vendor, the AOIC will consider third-party hosting services for use and hosting of the Conference / Event Management application. The vendor's proposal should detail the hosting services, including the hardware, software, and support services to host and maintain the Conference / Event Management application. The proposal should also detail software licensing, support, and upgrade practices.

Any proposal offering hosting services should detail the services offered, identify specific service levels for response times, processing cycles, disk space allocations, uptime service levels, hardware and software customizations, etc. Proposal must clearly detail licensing and use costs and all limitations on use / access.