

UNITED STATES DISTRICT COURT  
Northern District of California  
CLERK'S OFFICE ADMINISTRATION DEPARTMENT  
450 GOLDEN GATE AVENUE  
SAN FRANCISCO, CA 94102

ANITA M. BOCK  
Chief Deputy of Administration

**REQUEST FOR QUOTATION**

**This is a Request for Quote (RFQ) for OPEN MARKET PRICING for the conversion of Corel WordPerfect files, Templates and Macro to Microsoft Word. Award will be made on the basis of the lowest priced technically acceptable quote.**

**Request Date:** September 7, 2011  
**Question Closing Date:** September 22, 2011  
**Request Closing:** 4:00 p.m. (PST) on September 23, 2011  
**RFQ Number:** USDC-CAND-WPC-2011-01

**Special Notes and Instructions**

1. This is a request by the United States District Court, Northern District of California (the "Court") for Open Market Pricing. All items should be quoted F.O.B destination.
2. A fixed price award from this RFQ will be made based on the lowest price / technically acceptable offer.
3. All questions or clarifications must be submitted by 1:00 p.m. (PST) on September 22, 2011 to the court representative listed in item 4.
4. **Quotes must be emailed to the below listed court representative at the listed address no later than 1:00 p.m. on the Requested Closing Date of September 23, 2011:**

**Carlos Obando, IT Budget & Procurement Technician**  
**U.S District Court | Northern District of California**  
**450 Golden Gate Avenue**  
**Room 16-5230**  
**San Francisco, CA 94102**  
[Carlos\\_obando@cand.uscourts.gov](mailto:Carlos_obando@cand.uscourts.gov)

5. A technical proposal describing the approach must be submitted in accordance with the attached statement of work.
6. At least three past performance references must be submitted with the proposal.
7. For this procurement, the Court suggests the following factors be submitted in the final proposal:
  - a) Technical approach
  - b) Relevant past experience of the proposing company
8. Source selection will be made on a 'lowest price / technically acceptable' basis.

9. If the proposing company fails to provide the required information or if the information cannot be verified to the satisfaction of the court, then the proposing company's proposal may be rejected without further consideration.

10. Quotes for RFQ USDC-CAND WPC-2011-01 must include the following:

<u>Short Description</u>	<u>List of Tasks</u>	<u>Unit Price</u>	<u>Extended Price</u>
<b><u>1</u> Project Planning</b>	<b>Pre-planning meeting and/or onsite visit(s). (if required)</b>		
<b><u>2</u> a. Labor Cost</b> -Conversion of macros and accompanying macro documents to Word 2010,	<b>Hourly or daily cost for assigned personnel.</b>		
<b>b. Labor Costs</b> -Conversion of boiler-plate "Chambers Forms" to Word 2010	<b>Hourly or daily cost for assigned personnel.</b>		
<b><u>3</u> Equipment Fees</b>	<b>Equipment fees deemed necessary for completion of project.</b>		
<b><u>4</u> Proprietary or Off-the-Shelf-Software License</b>	<b>Proprietary or off-the-shelf software conversion license for permanent in-house use. (if required.)</b>		
<b><u>5</u> Technical Support</b>	<b>Technical support after conversion. (if required)</b>		
<b><u>6</u> Travel (conversion performed onsite)</b>	<b>Vendor will provide an estimate of travel expenses including parking and meals. (if required)</b>		
		<b>Total Cost</b>	

**Vendor's Name:**

**Vendor's Address:**

**Vendor's City, State and Zip Code**

**Vendor's Street Address (if different from above)**

**Tax Identification Number:**

**Discount Terms or Net 30:**

**Performance Start Date:**

**Signature of Person Authorized to Sign Quote (Title and Date) (Electronic signature acceptable)**

## **STATEMENT OF WORK**

### **1. INTRODUCTION**

WordPerfect was introduced to the Court in the 1990s and, for the most part, the Court has been using Corel WordPerfect since then. Currently, District Court staff members use Word Perfect 13.0, although earlier versions may be installed on some PCs. The Court will move from Corel WordPerfect X3 to Microsoft Word 2010 for all documents.

### **2. PURPOSE**

The purpose of this RFQ is to hire a contractor with expertise in the conversion of WordPerfect perfect script macros to Microsoft Visual Studio for Office (VSTO) version 2010. When this project is complete we will have successfully converted all chosen WordPerfect files and macros to Word 2010.

### **3. SCOPE**

The vendor will convert templates and macros from WordPerfect into Word, and will preserve the current functionality of the WordPerfect macros. The vendor will re-create document files in Word where necessary.

Vendor and designated court staff will review documents for accuracy and test macros for functionality.

Vendor will disclose preference as to whether file conversions will be performed on-site and or off-site, the Court will have the final decision.

Vendor will provide the Court a permanent copy of the conversion software (if any) and any code/files/comments that he/she creates. Vendor will also provide court IT staff up to ten (10) hours of support time over a one (1) year period.

Vendor will maintain the same key shortcuts and changes to the "Quick Correct/Auto Correct" feature that this court is currently using with Wordperfect. For example: the quick correct for the word "teh" must not auto convert to the word "the". There are fewer than 5 of this type.

Vendor will provide a global "Quick Access" toolbar with shortcuts which the court has been accustomed to utilizing.

Vendor will provide a technique to update ribbon, "quick access" toolbar and "auto quick correct" via the Court's network.

Vendor will provide written instructions on how to convert Word Perfect user's dictionary to Word 2010.

### **4. SPECIAL REQUIREMENTS**

Contractor must have specialized knowledge of macro conversion from WordPerfect to Microsoft Word.

## **5. ADDITIONAL INFORMATION**

Approximately 15,000 lines of WordPerfect perfect script macro code will be converted and approximately 800 boiler plate forms.

A sample file containing two (2) boilerplate samples of the "Chambers Forms" and a stand-alone document assembly macro which is the complete macro for the "Judgment and Commitment" macro stated in paragraph above can be found at the link below:

<http://cand.uscourts.gov/filelibrary/808/macrosample.zip>

VSTO coding must be well commented throughout the coding process.

Dialog boxes will have the same look and feel as the existing macros.

Any court space and/or system access codes and/or passwords will be safeguarded from unauthorized use and may not be provided to personnel other than those directly assigned to this project.

All equipment, hardware, software, and/or services provided by the Court are the property of the Court and will not be used, copied, and/or removed from court space without the express consent of the court contracting officer (CCO) and the systems manager (SM).

No files may leave the control or possession of the court under any circumstances or at any time with our prior consent.

Contractor shall take reasonable precautions in the handling and use of court materials to protect against unauthorized use and/or damage.

Upon authorization to use and/or access court systems contractor shall ensure that all security precautions are taken during such use including: appropriate use of passwords, virus protection including current signature files, firewall protection including current version, and protection against unauthorized access.

No software will be loaded onto the court's network without the express consent of the CCO and or SM.

## **6. DESCRIPTION OF DELIVERABLES**

- First week from acceptance-Project meeting and/or site visit(s) (if required). Vendor will provide project completion time-frame. Vendor must review selected assigned WordPerfect files for conversion and if applicable report potential flaws which may hinder the conversion process.
- Third week from acceptance-Written review outlining a completion time line based on the assigned number of files and if required, contingency plans for Microsoft 2010 upgrade.
- Demonstration of converted files including but not limited to files, templates and macros to designated court staff.

- Brief training on proprietary or off the shelf conversion software (if required).
- All assigned converted files will be stored in a designated local/network disk drive or electronic media of the Court's choosing.

## **7. REVIEW AND ACCEPTANCE OF DELIVERABLES**

All deliverables will be presented to the court for acceptance per the contract and/or project plan, unless otherwise agreed by the court. The court will have a period of one month to accept, reject or object to a deliverable. Requirements for acceptance of an unacceptable deliverable must be negotiated by the contractor with the CCO. All corrections to deliverables are to be accomplished at no additional cost to the court.

## **8. LOCATION OF PERFORMANCE**

**All on-site work is to be performed at (see scope:**

**United States District Court | Northern District of California  
Clerk's Office, 16th Floor  
Phillip Burton Federal Building  
450 Golden Gate Ave  
San Francisco, CA 94102**

## **9. CONTRACTOR FURNISHED MATERIAL**

Contractor is responsible for providing all required materials necessary for work in providing finished conversion project.

## **10. TRAVEL AND PER DIEM REQUIREMENTS**

All travel and per diem associated with this project is the responsibility of the traveling party.

## **11. SOURCES OF INFORMATION AND DATA**

**The court contracting officer is:**

**Helene McVanner**

**[Helene.Mcvanner@cand.uscourts.gov](mailto:Helene.Mcvanner@cand.uscourts.gov)**

**415-522-2095**

**The court procurement technician is:**

**Carlos Obando**

**[Carlos.Obando@cand.uscourts.gov](mailto:Carlos.Obando@cand.uscourts.gov)**

**415-522-2081**

**Judiciary Purchase Order Terms and Conditions are attached.**

## JUDICIARY PURCHASE ORDER TERMS AND CONDITIONS

### PURCHASE ORDER TERMS AND CONDITIONS Provisions and Clauses

1) **Clause B-5 Clauses Incorporated by Reference (SEP 2010)**

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the contracting officer will make their full text available. Also, the full text of a clause may be accessed electronically at this address: <http://www.uscourts.gov/procurement.aspx>

2) The following clauses are included by reference:

**Clause 3-3, Provisions, Clauses, Terms and Conditions - Small Purchases (APR 2011)**

3) **Provision 3-5, Taxpayer Identification and Other Offeror Information (APR 2011)**

(a) *Definitions.*

“Taxpayer Identification (TIN),” as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a social security number or an employer identification number.

(b) All offerors shall submit the information required in paragraphs (d) and (e) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and implementing regulations issued by the IRS. If the resulting contract is subject to the payment reporting requirements, the failure or refusal by the offeror to furnish the information may result in a 31 percent reduction of payments otherwise due under the contract.

(c) The TIN may be used by the government to collect and report on any delinquent amounts arising out of the offeror’s relationship with the government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to payment recording requirements, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror’s TIN.

(d) *Taxpayer Identification Number (TIN):* \_\_\_\_\_

- ☐ TIN has been applied for.
- ☐ TIN is not required, because:
- ☐ Offeror is a nonresident alien, foreign corporation or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States;
- ☐ Offeror is an agency or instrumentality of a foreign government;
- ☐ Offeror is an agency or instrumentality of the federal government.

(e) *Type of organization:*

- ☐ sole proprietorship;
- ☐ partnership;
- ☐ corporate entity (not tax-exempt);
- ☐ corporate entity (tax-exempt);
- ☐ government entity (federal, state or local);
- ☐ foreign government;
- ☐ international organization per 26 CFR 1.6049-4;
- ☐ other \_\_\_\_\_.

(f)

*Contractor representations.*

The offeror represents as part of its offer that it is ☐ , is not, ☐ 51% owned and the management and daily operations are controlled by one or more members of the selected socio-economic group(s) below:

- ☐ Women Owned Business
- ☐ Minority Owned Business (if selected, then one sub-type is required)
  - ☐ Black American
  - ☐ Hispanic American
  - ☐ Native American (American Indians, Eskimos, Aleuts, or Native Hawaiians)
  - ☐ Asian-Pacific American (persons with origins from Burma, Thailand, Malaysia, Indonesia, Korea, The Philippines, U.S. Trust Territory of the Pacific Islands (Republic of Palau), Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, Guam, Samoa, Macao, Hong Kong, Fiji, Tonga, Kiribati, Tuvalu, or Nauru)
  - ☐ Subcontinent Asian (Asian-Indian) American (persons with origins from India, Pakistan, Bangladesh, Sri Lanka, , the Maldives Islands, or Nepal)
  - ☐ Individual/concern, other than one of the preceding.

(end)

*(The contracting officer will attach any other applicable standard judiciary provisions or clauses. The contracting officer will not include provisions or clauses which are already in the Clause 3-3. CO Note: Before including additional provisions or clauses refer to the Guide, Volume 14, [Appendix 1C](#) to determine, if the provision or clause can be included by reference or must be included in full text. If additional provisions are included by reference, then B-1 also must be included.)*