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| --- |
| Exhibit 4  Proposer Response Template  [Insert Company Name Here]  for  RFP NUMBER – RFP-FS-2021-15-AL  INTEGRATED WORKPLACE MANAGEMENT SYSTEM (IWMS) and Ongoing Support for FACILITIES SERVICES  *Proposals Due: October 5, 2021*  *NO LATER THAN 5:00 P.M. PACIFIC TIME* |

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# Introduction

Below is an outline of the structure for the response to this RFP. The Proposer will replace the designator “[INSERT CONTENT HERE]” with]” with the Proposer’s response content.

All worksheets must be saved in both .xlsx **and** .pdf formats. Filenames must be in the following format: *[Worksheet name] – Exhibit x \_Company-Name*

# Proposer’s Information

Company name:

Address:

Phone:

Fax:

Federal Tax IDID:

Representative Name:

Title:

Address:

Phone:

E-mail:

# Company Overview and Financial Information

|  |  |
| --- | --- |
| **Company Information** | |
| **Company name** |  |
| **Name of Account Executive Serving as Lead on RFP Response**  **1a. Title of Account Executive Serving as Lead on RFP Response**  **1b. Contact Information for Account Executive Serving as Lead on RFP Response** |  |
| **Number of full-time employees** |  |
| **Total number of IWMS implementations** |  |
| **Industry (NAICS)**  *(North American Industry Classification System)* |  |
| **Headquarters Location** |  |
| **Date Founded** |  |
| **Company Ownership**  *(i.e., private/public, joint venture)* |  |
| **Number of years Proposer has been providing IWMS Implementation and Maintenance and Support Services** |  |
| **Provide a list of at least 20 clients, including the number of users.**  **If Proposer has fewer than 20 clients, provide the full list of clients.** |  |
| **Company name** |  |
| **Name of Account Executive Serving as Lead on RFP Response**  **1a. Title of Account Executive Serving as Lead on RFP Response**  **1b. Contact Information for Account Executive Serving as Lead on RFP Response** |  |
| **End of Table** | |

# Executive Summary

Provide a high-level summary of the response to this RFP. This part of the response is a free narrative section. The executive summary must describe the Proposer’sProposer’s approach for the implementation of the IWMS system software.

[INSERT CONTENT HERE]

# Experience and Qualifications

Provide a description of the team or teams that will deliver services. This should identify resources responsible for Project Management, Implementation, and Deployment, as well as Subscription Services.

[INSERT CONTENT HERE]

## Résumés for Key Staff

For each Key Staff member, the Proposer must provide a résumé describing the individual’s background, experience, and ability in performing their proposed role and activities.

[INSERT CONTENT HERE]

# Response to Requirements

The Proposer must present the proposed method for implementing stated requirements, data migration, testing, training, and managed services requested.

## Statement of Work, Exhibit 1

The Proposer must include its response to Exhibit 1.

### Statement of Work Overview (Exhibit 1, 2.0)

The Proposer shall provide a recommended approach and a Project Schedule (i.e., project timeline in Gantt or WBS format) for implementation of the included Statement of Work (SOW).

The Proposer shall respond yes or no to the included SOW and optionally provide comments to its responses.

[INSERT CONTENT HERE]

### Business and Technical Requirements, Exhibit 1a

The Proposer shall respond with yes or no.

[CONTENT ATTACHED IN EXCEL FORM PROVIDED]

### Council Report Requirements, Exhibit 1b

The Proposer shall respond with yes or no.

[CONTENT ATTACHED IN EXCEL FORM PROVIDED]

### Managed Services Requirements, Exhibit 1c

The Proposer shall respond with yes or no.

[CONTENT ATTACHED IN EXCEL FORM PROVIDED]

# Supporting Documentation

## Acceptance of the Master Agreement

Proposer’s Acceptance of Master Agreement

[INSERT CONTENT]

## Certifications, Attachments, and Other Requirements

All applicable Attachments (See FS 2021 IWMS RFP Document 4.0)

[INSERT CONTENT]

# Supplemental Documentation

## Third-Party Products

For third-party products/optional software, the Proposer must explicitly state the name of any third-party products that are part of the Proposer’s solution.

For each third-party product, there must be a statement regarding whether the Proposer’s solution will encompass the third-party product and/or whether the Judicial Council will be required to contract for the product separately to contract on its own.

The Proposer must include a description of any products, features, or other value-added components required to address this RFP.

The Proposer must also provide proof of its ability to provide long-term support for the third-party software components.

[INSERT CONTENT HERE]

## Optional Attachments

Any other information submitted beyond that required by this RFP that the Proposer deems applicable to its Proposal should be placed in this section.

[INSERT CONTENT HERE]

# Cost Data

**The cost portion must be submitted in a separate file in the format .xlsx provided with the RFP.**

## Exhibit 3, Cost Workbook

The Proposer must complete all tabs in Exhibit 3, Cost Workbook.

[CONTENT ATTACHED IN EXCEL FORM PROVIDED]

# Response Checklist

The Proposer should ensure all items listed below have been completed and included or addressed in the provided RFP response to be considered as a viable solution for the Judicial Council.

IWMS RFP Response

Title Page

Table of Contents

Proposer’s Information

Proposer’s Company’s Name, Address, Telephone, Fax, and Federal Identification Number

Proposer’s Representative’s Name, Title, Address, Telephone, and Email Address

Financial Statements

Executive Summary

Company Overview

Proposer’s Experience and Qualifications

Résumés

Response to Exhibit 1: Statement of Work

Exhibit 1a: Business and Technical Requirements

Exhibit 1b: Council Report Requirements

Exhibit 1c: Managed Services Requirements

Proposer’s Acceptance of Master Agreement

All Applicable Supplemental Documents (See FS 2021 IWMS RFP Document 4.0)

California seller’s permit or certification of registration

Proof of good standing and qualification to conduct business in California

Current business license, professional certification, or other credentials

Attachment 4: General Certifications

Attachment 5: Small Business Declaration (*only if Proposer wishes to participate in the Small Business Incentive*)

Attachment 6A: Payee Data Record (STD 204)

Attachment 6B: Payee Data Record Supplement (STD 205) (*optional*)

Attachment 7: Iran Contracting Act Certification

Attachment 8: Unruh and FEHA Certification

Attachment 9: Darfur Contracting Certification

Attachment 10: Proposer Submission Questions Form

Attachment 11: Letter of Intent to Bid

Attachment 12: Qualifications Reference Sheet

Attachment 13: Bidder Declaration

Attachment 14: DVBE Declaration

Supplemental Document

Third-Party Products

Cost Data

Exhibit 3: Cost Workbook