

REQUEST FOR PROPOSALS

COURT OF APPEAL, THIRD APPELLATE DISTRICT

REGARDING:

Relocation Manager or Move Consultant for relocation of the Court of Appeal, Third Appellate District, from its temporary location in the U.S. Bank Tower at 621 Capitol Mall to its permanent location in the Stanley Mosk Library and Courts Building at 914 Capitol Mall, Sacramento, California.

3 DCA RFP 11/12-01

PROPOSALS DUE:

TUESDAY, JANUARY 31, 2012, NO LATER THAN 5:00 P.M. PACIFIC TIME

1.0 BACKGROUND INFORMATION

- 1.1 In February 2009, the Court of Appeal, Third Appellate District (the Court), moved to a temporary location in the U.S. Bank Tower at 621 Capitol Mall, Sacramento, during the renovation of the historic 1928 Stanley Mosk Library and Courts Building in Sacramento, a five story building of approximately 200,000 square feet. The Court will occupy approximately 62,000 square feet on four floors. Included in the renovation project are complete fire sprinklers, life safety upgrades, substantially new mechanical, electrical and plumbing systems, security upgrades, improved accessibility, new roofing and exterior repairs, hazardous material abatement, and renovation of historic ceilings, lights, art, and elevators. The renovation is scheduled to be complete in November 2012. The building contains two tenants, the Court and the California State Library. The single courtroom is also occasionally used by the California Supreme Court. The tenants will move back into the historic building after completion of the renovation. The building is a State-owned building, with the Department of General Services (DGS) being responsible for overall management of the building and renovation project.
- 1.2 The U.S. Bank Tower is a 26 story high rise, owned and managed by David S. Taylor Interests, Inc. The Court occupies approximately 61,000 square feet, spanning three floors of the building.
- 1.3 The Court has approximately 80 employees and 10 justices. Personnel and equipment will be moved from the U.S. Bank Tower to the Library and Courts Building. In addition, the Court has equipment stored in an off-site storage facility. Items at the U.S. Bank Tower and the storage location include, but are not limited to, office furniture, information technology equipment, office supplies, systems furniture, and historically valuable items, as well as multiple law libraries and a complete case file room.

2.0 DESCRIPTION OF SERVICES AND DELIVERABLES

- 2.1 The Court seeks the services of a person or entity with expertise in relocation management.
- 2.2 The service provider will work in conjunction with the Court to identify and track personnel and equipment to be moved. The service provider will also work with the Court to identify needs and establish defined scopes of work for a move vendor, technical crews, and other services to complete the relocation. The service provider will assist the Court in developing a detailed relocation plan and schedule to accommodate the needs of individual departments, with revisions as needed.

- 2.3 The service provider will be asked to:
- a. Develop a detailed relocation plan and schedule with phasing to accommodate the Court's needs;
 - b. Manage critical deadlines and coordinate with the Court as needed;
 - c. Coordinate with the Court, move vendor, the U.S. Bank Tower, DGS, and other agencies and entities as needed;
 - d. Monitor site(s) as needed to identify and resolve any issues prior to and during the move;
 - e. Develop a plan to identify and track personnel and equipment to be moved and update with revisions as needed;
 - f. Identify needs and develop comprehensive scopes of work for a move vendor and other vendors as needed, and assist the Court in selection of additional vendors as needed;
 - g. Provide client and site regulations to move crews and enforce adherence to these regulations;
 - h. Manage delivery and pick up of packing materials and equipment as needed;
 - i. Provide on-site supervision and coordination during each phase of the relocation;
 - j. Address and resolve any quality control or customer satisfaction issues;
 - k. After the move, perform a site walk with Court representatives and generate a punch list, and ensure the timely resolution of any punch list items.

3.0 TIMELINE FOR THIS RFP

The Court has developed the following list of key events related to this RFP. All dates are subject to change at the discretion of the Court.

EVENT	DATE
RFP issued	January 18, 2012

EVENT	DATE
Deadline for questions	January 23, 2012
Questions and answers posted	January 26, 2012
Latest date and time proposal may be submitted	January 31, 2012 5:00 p.m. P.T.
Evaluation of proposals (<i>estimate only</i>)	February 20, 2012
Notice of Intent to Award (<i>estimate only</i>)	February 21, 2012
Negotiations and execution of contract (<i>estimate only</i>)	March 2012
Contract start date (<i>estimate only</i>)	April 2012
Contract end date (<i>estimate only</i>)	January 2013

4.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (Non-IT Services)	These rules govern this solicitation.
Attachment 2: Court Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must sign this Court 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: Darfur Contracting Act Certification	If Proposer has had business activities or other operations outside of the United States within the previous three years, Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.

Attachment 5: Travel Rate Guidelines	Travel will be reimbursed in accordance with the attached Travel Rate Guidelines.
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5.0 SUBMISSIONS OF PROPOSALS

- 5.1 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.
- 5.2 The Proposer must submit its proposal in two parts, the technical proposal and the cost proposal.
- a. The Proposer must submit **one (1) original and five (5) copies** of the technical proposal. The original must be signed by an authorized representative of the Proposer. The Proposer must write the RFP title and number on the outside of the sealed envelope.
 - b. The Proposer must submit **one (1) original and five (5) copies** of the cost proposal. The original must be signed by an authorized representative of the Proposer. The original cost proposal (and the copies thereof) must be submitted to the Court in a single sealed envelope, separate from the technical proposal. The Proposer must write the RFP title and number on the outside of the sealed envelope.
 - c. The Proposer must submit an electronic version of the entire proposal on CD-ROM. The files contained on the CD-ROM should be in PDF, Word, or Excel formats.
- 5.3 Proposals must be delivered by the date and time listed on the coversheet of this RFP to:
- Deena C. Fawcett
Clerk/Administrator
Court of Appeal, Third Appellate District
621 Capitol Mall, 10th Floor
Sacramento, CA 95814
- 5.4 Late proposals will not be accepted.
- 5.5 Only written proposals will be accepted. Proposals must be sent by registered or certified mail, courier service (e.g., FedEx), or delivered by hand. Proposals may not be transmitted by fax or email.

6.0 PROPOSAL CONTENTS

- 6.1 Technical Proposal. The following information must be included in the technical proposal. A proposal lacking any of the following information may be deemed non-responsive.
- a. Proposer's name, address, telephone and fax numbers, and federal tax identification number. Note that if 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 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.
 - d. Names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Proposer has conducted similar services. The Court may check references listed by Proposer.
 - e. The Proposer's overall plan with time estimates for completion of all work required and proposed method to complete the work. Proposals will be evaluated by the Court using the following criteria:
 - i. Quality of the work plan submitted;
 - ii. Experience on similar assignments;
 - iii. Reasonableness of cost projections;
 - iv. Credentials of staff to be assigned to the project;
 - v. Acceptance of Terms and Conditions;
 - vi. Ability to meet the timing requirements to complete the project.
 - f. Acceptance of the Terms and Conditions.
 - i. On Attachment 3, the Proposer must either indicate acceptance of the Terms and Conditions or clearly identify exceptions to the Terms and Conditions. An "exception" includes any addition, deletion, qualification, limitation, or other change.

- ii. If exceptions are identified, the Proposer must also submit a red-lined version of the Terms and Conditions that clearly tracks proposed changes, and a written explanation or rationale for each exception and/or proposed change.
- iii. **Note: A material exception to a Minimum Term will render a proposal non-responsive. Minimum terms include those items described in Section 4.0 above.**

g. Certifications, Attachments, and Other Requirements.

- i. Proposer must include the following certification in its proposal:

Proposer has no interest that would constitute a conflict of interest under California Public Contract Code sections 10365.5, 10410 or 10411; Government Code sections 1090 et seq. or 87100 et seq.; or rule 10.103 or rule 10.104 of the California Rules of Court, which restrict employees and former employees from contracting with judicial branch entities.

- ii. If Proposer has had business activities or other operations outside of the United States within the previous three (3) years, Proposer must complete the Darfur Contracting Act Certification (Attachment 4) and submit the completed certification with its proposal.
- iii. If Proposer is a corporation, proof that Proposer is in good standing and qualified to conduct business in California.
- iv. Copies of current business licenses, professional certifications, or other credentials.
- v. Proof of financial solvency or stability (e.g., balance sheets and income statements).

6.2 Cost Proposal. The following information must be included in the cost proposal.

- 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.

7.0 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 Court reserves the right to negotiate extensions to this period.

8.0 EVALUATION OF PROPOSALS

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

The Court 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.

CRITERION	MAXIMUM NUMBER OF POINTS
Quality of work plan submitted	20%
Experience on similar assignments	25%
Reasonableness of cost projection	30%
Credentials of staff to be assigned to the project	10%
Acceptance of the Terms and Conditions	10%
Ability to meet timing requirements to complete the project	5%

9.0 INTERVIEWS

The Court 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 in person or by phone. If conducted in person, interviews will likely be held at the Court’s offices. The Court will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The Court will notify eligible

Proposers regarding interview arrangements.

10.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

One copy of each proposal will be retained by the Court for official files and will become a public record. California judicial branch entities are subject to rule 10.500 of the California Rules of Court, which governs public access to judicial administrative records (see www.courtinfo.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10_500).

If information submitted in a proposal contains material noted or marked as confidential and/or proprietary that, in the Court's sole opinion, meets the disclosure exemption requirements of Rule 10.500, then that information will not be disclosed upon a request for access to such records. If the Court finds or reasonably believes that the material so marked is **not** exempt from disclosure, the Court will disclose the information regardless of the marking or notation seeking confidential treatment.

11.0 DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION GOALS

The Court has waived the inclusion of DVBE participation in this solicitation.

12.0 PROTESTS

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract 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 Court to receive a solicitation specifications protest is March 4, 2012. Protests should be sent to:

Vance W. Raye, Administrative Presiding Justice
Court of Appeal, Third Appellate District
621 Capitol Mall, 10th Floor
Sacramento, CA 95814