



REQUEST FOR PROPOSALS

JUDICIAL COUNCIL OF CALIFORNIA

REGARDING:

RFP TITLE: PROBATE AND MENTAL HEALTH INSTITUTE

RFP NUMBER: CRS SP 219

(Full Service)

PROPOSALS DUE:

April 17, 2017 NO LATER THAN End of business.
PACIFIC TIME

1.0 BACKGROUND INFORMATION

- 1.1 Judicial Council of California. The Judicial Council of California, chaired by the Chief Justice of California, is the chief policy making agency of the California judicial system. The California Constitution directs the council to improve the administration of justice by surveying judicial business, recommending improvements to the courts, and making recommendations annually to the Governor and the Legislature. The council also adopts rules for court administration, practice, and procedure, and performs other functions prescribed by law. The Judicial Council of California is the staff agency for the council and assists both the council and its chair in performing their duties.
- 1.2 Judicial education program for judges and court attorneys in a probate assignment.
- 1.3 History of the program. Location, Hotel and Pickups.

2.0 DESCRIPTION OF SERVICES AND DELIVERABLES

The Judicial Council of California seeks the hotel or conference center for the following program:

- Title: Probate and Mental Health Institute
- Dates: In no order of preference: September 10-13, 2017 OR September 12-15, 2017 OR September 24-27, 2017
- Description: Furnish sleeping rooms, meals and facilities for the program
- Location: In no order of preference: Anaheim, Long Beach, San Diego
- Payment: Citibank, NA Corporate Meeting Cards (CMC)

- Judicial Council of California’s maximum termination fee and maximum for meeting and function rooms rental: \$10,000

- Judicial Council of California’s maximum sleeping room unit rate:
Anaheim and Long Beach: \$120.00
San Diego: \$125.00

- Judicial Council of California’s maximum food and beverage unit rates for group meals including tax and gratuity:

<u>Breakfast</u>	<u>AM Coffee Service</u>	<u>Lunch</u>	<u>Dinner</u>
<u>\$25.00</u>	<u>\$8.00</u>	<u>\$40.00</u>	<u>\$40.00</u>

- Judicial Council of California’s maximum requirements for meeting and functions, food and beverage and sleeping room blocks are detailed on the Form for Submission of the Technical Details in Attachment 5.

3.0 TIMELINE FOR THIS RFP

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

EVENT	DATE
RFP issued	April 3, 2017
Deadline for questions to conferenceQandA@jud.ca.gov	April 6, 2017
Questions and answers posted (<i>estimate only</i>)	April 7, 2017
Latest date and time proposal may be submitted	April 17, 2017
Evaluation of proposals (<i>estimate only</i>)	Week of April 24, 2017
Short list of venues to be determined and site visits or interviews to be arranged. (<i>estimate only</i>)	Week of May 1, 2017
Notice of Intent to Award (<i>estimate only</i>)	Week of May 18, 2017
Negotiations and execution of contract (<i>estimate only</i>)	Week of May 18, 2017
Contract start date (<i>estimate only</i>)	June 12, 2017
Contract end date (<i>estimate only</i>)	September 30, 2017

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: Judicial Council of California Standard Terms and Conditions	<p>If selected, the person or entity submitting a proposal (the “Proposer”) must sign a Judicial Council of California Standard Form agreement containing these terms and conditions (the “Terms and Conditions”).</p> <p>The provisions marked with an (*) within the Terms and Conditions are minimum contract terms and conditions (“Minimum Terms”).</p>
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.
Attachment 4: Darfur Contracting Act Certification	Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.
Attachment 5: Submission form for Technical & Cost Proposal	This form details the technical and cost requirements for the program and must be completed and submitted in response to RFP’s technical requirements.
Attachment 6: Conflict of Interest Certification Form	Proposer must complete Conflict of Interest Certification and submit the completed certification with its proposal

5.0 SUBMISSIONS OF PROPOSALS

- 5.1 Proposals should provide straightforward, concise information that satisfies the requirements of Section 7 (“Proposal Contents”). 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 Proposals must be delivered by one of the options below

- a. Mail: The Proposer must submit **one (1) original and one (1) copy of** the technical proposal and the cost proposal, as well as the additional attachments. The original must be signed by an authorized representative of the Proposer. Bidders must write the RFP title **(Probate and Mental Health Institute)** and number **(CRS SP 219)** on the outside of the sealed envelope. Proposals should be sent by registered mail, certified mail, overnight courier, or by hand delivery and must be delivered by the date and time listed on the coversheet of this RFP to:

Judicial Council of California
Attn: 5th Floor Reception, RFP # CRS SP 219
455 Golden Gate Avenue
San Francisco, CA 94102

- b. E-mail: Proposals may be submitted by E-mail to: ConferenceRFPs@jud.ca.gov and must be delivered by the date and time listed on the coversheet of this RFP. Bidders must write the RFP title **(Probate and Mental Health Institute)** and number **(CRS SP 219)** in the subject line of the E-mail. The only acceptable proof of delivery for submittals made by E-mail will be the automated receipt (with a date and time receipt) generated by JCC upon the successful receipt of the bidders' proposal.

5.3 Late proposals will not be accepted regardless of the method sent. Proposer assumes all risk of late delivery by e-mail or any other method. Proposals received after the deadline will be rejected without review.

5.4 Incomplete submittals may be rejected without review

6.0 PROPOSAL & COST CONTENTS

6.1 **Technical & Cost Proposal (Attachment 5)**. The following information must be included in the technical & cost proposal. A proposal lacking any of the following information may be deemed non-responsive.

- a. Legal name and address of firm (Proposer), the Contact's name, title, telephone numbers and E-mail address, federal tax identification number, web site, hotel check-in/out time, and guest room reservation cancellation policy. 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. Propose meeting and function room schedule, including date, time and a description of the meeting and function room (noting dimensions, any odd shapes, angles, pillars and other salient characteristics). Propose schedule based upon the estimated meeting and function room block indicated on Attachment 5.
Answer additional questions regarding the meeting space.
- c. Propose program date and answer ADA compliance and AV questions.
- d. Propose meeting and function room rates.
- e. Propose termination fee and corresponding effective deadline date.
- f. Propose food and beverage menus, and food and beverage unit rate(s) inclusive of any service charges, gratuity, and/or sales tax based upon allowable maximum unit prices reimbursable by the Judicial Council of California in Section 2.
- g. Propose sleeping room unit rate(s).
- h. Propose the cut-off date for reservations.
- i. Propose the sleeping room rate(s) for tax and/or surcharges.
- j. Propose parking passes, complimentary passes and normal parking rate(s), inclusive of any service charges, gratuity, and/or sales tax.
- k. Propose Internet fees for meeting space and individual guest rooms.
- l. Acceptance of additional program needs and concessions.
- m. Provide the signature of the proposer.

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.

6.2. 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 in the Standard Agreement (Attachment 2).
- 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.**

6.3. Certifications, Attachments, and other requirements.

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

Using Attachment 6, 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 years, Proposer must complete the Darfur Contracting Act Certification attached as 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.

6.4 **Submission of Proposals**

- a. **The Proposer should include the following attachments:**

- **Attachment 2 – Judicial Council of California Standard Terms and Conditions – only if there are exceptions/modifications as indicated on Attachment 3.**
- **Attachment 3 – Proposer’s Acceptance of Terms and Conditions**
- **Attachment 4 – Darfur Contracting Act Certification**
- **Attachment 5 – Submission form for Technical & Cost Proposal**
- **Attachment 6 – Conflict of Interest Certification Form**
- **Capacity chart and floor plan**

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 ninety (90) day

period, the Judicial Council of California 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 Judicial Council of California 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	PERCENTAGE
Cost	30%
Acceptance of Terms and Conditions	10%
Property	20%
Meeting and Function Space	25%
Food and Beverage	10%
Concessions	5%

9.0 INTERVIEWS

The Judicial Council of California may conduct interviews with Proposers to clarify aspects set forth in their proposals. If conducted, interviews will likely be conducted by phone or during site visits. The Judicial Council of California will not reimburse Proposers for any costs incurred pertaining to an interview, including travel expenses. The Judicial Council of California will notify eligible Proposers regarding interview arrangements.

10.0 RIGHTS

The Judicial Council of California reserves the right to reject any and all proposals, in whole or in part, as well as the right to issue similar RFPs in the future. This RFP is in no way an agreement, obligation, or contract and in no way is the Judicial Council of California or the State of California responsible for the cost of preparing a proposal. One copy of each proposal will be retained by the Judicial Council of California for official files and will become a public record.

11.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

California judicial branch entities are subject to rule 10.500 of the California Rule of Court (see www.courtinfo.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10_500), which governs public access to judicial administrative records.

If information submitted in a proposal contains material noted or marked as confidential and/or proprietary that, in the Judicial Council of California'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 Judicial Council of California finds or reasonably believes that the material so marked is **not** exempt from disclosure, the Judicial Council of California will disclose the information regardless of the marking or notation seeking confidential treatment.

12.0 DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION GOALS

The Judicial Council of California has waived the inclusion of DVBE participation in this solicitation

13.0 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 Judicial Council of California to receive a solicitation specifications protest is the due date and time for submittal of proposals.

Protests should be sent to:

JUDICIAL COUNCIL OF CALIFORNIA
Branch Accounting and Procurement - Contracts
ATTN: Protest Hearing Officer
455 Golden Gate Avenue, 6th Floor
San Francisco, CA 94102

The Judicial Council of California, Conference & Registration Services does not retain the services of third party or outsourced representation. All quoted rates are to be net, not commissionable.