ATTACHMENT 9

Price Proposal WORKBOOK

The Price Proposal Workbook consists of the following two parts; (1) Part 1 - Price Proposal, and (2) Part 2 - Pricing for Sample Orders.

1. **PART 1 - PRICE PROPOSAL INSTRUCTIONS**

In this part of the Price Proposal, Proposer will list its proposed pricing for each of the services described in Attachment 8 - Scope of Work. If the Proposer is awarded a Standard Agreement with the Judicial Council, the prices submitted by the Proposer in this Attachment will be the pricing included in the Standard Agreement.

Complete the pricing table below. Pricing fields shaded in grey are to be left blank.

| **No.** | **Service Description** | **Actual Cost** | **Not to Exceed Firm Fixed Price or Rate Schedule** | **Hourly Rate or Rates** | | **Other Not to Exceed Firm Fixed Price or Rate** |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Instructions:** | Yes\* or Leave Blank | Fixed Price in $  Rate Schedule in $ per \_\_ | Position Title(s)  Job Title(s) | $ per \_\_\_\_\_ | $ per \_\_\_\_\_ |
| 1. | UPDATES TO REPORTS: Issue updates to existing preliminary reports, including copies of all underlying exception and exclusion documents. |  |  |  |  |  |
| 2. | NEW REPORTS: Issue new preliminary reports, including copies of all underlying exception and exclusion documents. The following two (2) scenarios may apply: |  |  |  |  |  |
| 2a. | The Judicial Council will provide a copy of an existing title policy or preliminary report. |  |  |  |  |  |
| 2b. | The Judicial Council will **not** provide a copy of an existing title policy or preliminary report. |  |  |  |  |  |
| 3. | OTHER INFORMATION AND DOCUMENTS: Provide other related information and documents of record concerning title to a property, such as copies of vesting deeds, parcel maps, tract maps, all maps referenced in the legal description of the subject property, and other documents, upon request. |  | At no charge |  |  |  |
| 4. | CHAIN OF TITLE: Issue chain of title reports upon request. |  |  |  |  |  |
| 4a. | Issue Chain of Title going back 30 years. |  |  |  |  |  |
| 4b. | Issue Chain of Title going back beyond 30 years. |  |  |  |  |  |
| 5. | LITIGATION GUARANTEES: Issue litigation guarantees upon request. |  |  |  |  |  |
| 6. | LEGAL DESCRIPTIONS: Assist the Judicial Council and its consultants with the review of legal descriptions for: |  |  |  |  |  |
| **No.** | **Service Description** | **Actual Cost** | **Not to Exceed Firm Fixed Price or Rate Schedule** | **Hourly Rate or Rates** | | **Other Not to Exceed Firm Fixed Price or Rate** |
|  | **Instructions:** | Yes\* or Leave Blank | Fixed Price in $  Rate Schedule in $ per \_\_ | Position Title(s)  Job Title(s) | $ per \_\_\_\_\_ | $ per \_\_\_\_\_ |
| 6a. | Public and private properties. |  |  |  |  |  |
| 6b. | Unrecorded easements, rights of way or other apparent encumbrances or rights. |  |  |  |  |  |
| 6c. | Plot easements, rights of way and other title exceptions and encumbrances. |  |  |  |  |  |
| 7. | MARKETABLE TITLE: Assist the Judicial Council and its consultants and the property owners in resolving issues affecting marketable title to properties by providing necessary services, including but not limited to the following: |  |  |  |  |  |
| 7a. | Review proposed corrective instruments. |  |  |  |  |  |
| 7b. | Advise as to whether a particular proposed corrective instrument achieves its purpose, or (if it does not) what revisions are needed so that it does achieve its purpose. |  |  |  |  |  |
| 7c. | Record corrective instruments |  | At no charge |  |  |  |
| 7d. | Provide additional services on an "as needed" basis. |  |  |  |  |  |
| 8. | PRO FORMAS: Issue Pro Forma Title Policies upon request by the Judicial Council. The Judicial Council will designate the amount of insurance required. |  | At no charge |  |  |  |
| 9. | CLTA COVERAGE: Issue CLTA owner’s policies of title insurance for properties conveyed to the Judicial Council in fee (as designated by the Judicial Council) together with appropriate title endorsements, including, but not limited to: |  |  |  |  |  |
| 9a. | CLTA 100 Comprehensive Coverage |  |  |  |  |  |
| **No.** | **Service Description** | **Actual Cost** | **Not to Exceed Firm Fixed Price or Rate Schedule** | **Hourly Rate or Rates** | | **Other Not to Exceed Firm Fixed Price or Rate** |
|  | **Instructions:** | Yes\* or Leave Blank | Fixed Price in $  Rate Schedule in $ per \_\_ | Position Title(s)  Job Title(s) | $ per \_\_\_\_\_ | $ per \_\_\_\_\_ |
| 9b. | CLTA 103.1A Encroachment Coverage |  |  |  |  |  |
| 9c. | CLTA 103.4 Access through an Easement |  |  |  |  |  |
| 9d. | CLTA 103.7 Access |  |  |  |  |  |
| 9e. | CLTA 110.1 Deletion of Item from Policy |  |  |  |  |  |
| 9f. | CLTA 116 Location |  |  |  |  |  |
| 9g. | CLTA 116.1 Survey |  |  |  |  |  |
| 9h. | CLTA 116.4 Contiguity |  |  |  |  |  |
| 9i. | CLTA 116.7 Subdivision |  |  |  |  |  |
| 9j. | CLTA 123.3 Zoning |  |  |  |  |  |
| 9k. | Aggregate Title Insurance Endorsement |  |  |  |  |  |
| 9l. | Others as required (to be quoted on an as needed basis through the Work Authorization process) |  |  |  |  |  |
| 10. | AGGREGATE TITLE INSURANCE ENDORSEMENT: Provide an aggregate title insurance endorsement under one master extended-coverage owner’s policy covering all or a portion of Judicial Branch properties (as specifically requested by the Judicial Council) which your firm has insured or will insure. |  | See 9k. above. |  |  |  |
| 11. | RECORD DOCUMENTS: Record deeds, easements, memoranda of agreements and related documents required with respect to the transfer of title, or other insurable interest in, each property in the office of the County Recorder for the county in which the property is located, even if said recordation is not in connection with an open escrow or with the issuance of a policy (courtesy recording). |  | At no charge |  |  |  |
| 12. | DISTRIBUTE DOCUMENTS: Distribute originals or copies (as appropriate) of executed and/or recorded closing documents to the parties. |  | At no charge |  |  |  |
| 13. | ESCROW: Receive, hold and disburse to the party or parties entitled thereto amounts required to be deposited into escrow and/or disbursed in connection with the closing of each property transaction. |  |  |  |  |  |
| 14. | CLOSING STATEMENTS: Prepare closing settlement statements reflecting pro-rations and funds disbursed through escrow in each property transaction. |  |  |  |  |  |
| 14a | Escrow - overnight mail |  |  |  |  |  |
| 14b. | Escrow - courier fees |  |  |  |  |  |
| 14c. | Escrow - document preparation |  |  |  |  |  |
| 15. | DELIVERY OF REPORTS, POLICIES OF TITLE INSURANCE, AND OTHER DOCUMENTS: The Judicial Council requires all documents, title reports, policies of title insurance, and status reports to be delivered by e-mail to the Judicial Council. If documents contain hyperlinks to other documents, the hyperlinks must remain active and accessible to the Judicial Council throughout the term of the Standard Agreement (including any renewal terms), and for a minimum of 24 months after the expiration of the Standard Agreement. |  | At no charge |  |  |  |
| 16. | PROPERTY PROFILES: Provide designated Judicial Council personnel with access to run property profiles online or provide copies of requested property profiles on request. |  | At no charge |  |  |  |
| **No.** | **Service Description** | **Actual Cost** | **Not to Exceed Firm Fixed Price or Rate Schedule** | **Hourly Rate or Rates** | | **Other Not to Exceed Firm Fixed Price or Rate** |
|  | **Instructions:** | Yes\* or Leave Blank | Fixed Price in $  Rate Schedule in $ per \_\_ | Position Title(s)  Job Title(s) | $ per \_\_\_\_\_ | $ per \_\_\_\_\_ |
| 17. | ADDITIONAL SERVICES\*\*: Provide other services in support of fulfilling the Judicial Council’s needs with regard to the procurement of title and escrow services, provided that such additional services can be provided in accordance with the provisions of the Standard Agreement. |  |  |  |  |  |

\* Provide maximum Hourly Rate.

1. **PART 2 – PRICING FOR SAMPLE ORDERS**

Below are four (4) hypothetical order scenarios which are representative of the types of orders the Judicial Council might expect to place during the next three years. In this part of the Price Proposal, Proposers will apply the pricing they have proposed in Part 1 to each of the hypothetical orders to come up with a total order cost.

**Instructions:** In each scenario below, price out the order using the prices and/or rates your firm has proposed in Part 1 above. Provide the line item breakdown and the total order cost for each scenario, so that in evaluating your Pricing Proposal, the Judicial Council can determine how the total order cost was calculated.

**Scenario 1**

**Item 2b** – New preliminary report, including copies of all underlying exception & exclusion documents referenced. Judicial Council will not provide copy of existing title policy or preliminary report.

**Item 1** – Update to preliminary report, including copies of all underlying exception & exclusion documents referenced.

**Item 8** - Pro forma: Issue Pro Forma CLTA Title Policy based on a value of $850,000.

**Item 9** - Issue CLTA owner’s policy of title insurance for property with a value of $850,000, conveyed to the Judicial Council in fee together with appropriate title endorsements, including: CLTA 100 Comprehensive Coverage; CLTA 103.1A Encroachment Coverage; CLTA 103.4 Access through an Easement; CLTA 103.7 Access; CLTA 110.1 Deletion of Item from Policy; CLTA 116 Location; CLTA 116.1 Survey; CLTA 116.4 Contiguity; CLTA 116.7 Subdivision; CLTA 123.3 Zoning; and Aggregate Title Insurance Endorsement.

**Item 13** - ESCROW: Receive, hold and disburse to the party or parties entitled thereto amounts required to be deposited into escrow and/or disbursed in connection with the closing of each property transaction.

**Item 14** - CLOSING STATEMENTS: Prepare closing settlement statements reflecting pro-rations and funds disbursed through escrow in each property transaction.

**Scenario 2**

*NOTE: The new title policy will combine eight separate parcels from eight title reports issued previously by your firm (assemblage of privately-owned properties).*

**Item 2b** – New preliminary report, including copies of all underlying exception & exclusion documents referenced. Judicial Council will not provide copy of existing title policy or preliminary report.

**Item 1** – Update to preliminary report, including copies of all underlying exception & exclusion documents referenced.

**Item 8** - Pro forma: Issue Pro Forma CLTA Title Policy based on a value of $10,000,000.

**Item 9** - Issue CLTA owner’s policy of title insurance for property with a value of $10,000,000, conveyed to the Judicial Council in fee together with appropriate title endorsements, including: CLTA 100 Comprehensive Coverage; CLTA 103.1A Encroachment Coverage; CLTA 103.4 Access through an Easement; CLTA 103.7 Access; CLTA 110.1 Deletion of Item from Policy; CLTA 116 Location; CLTA 116.1 Survey; CLTA 116.4 Contiguity; CLTA 116.7 Subdivision; CLTA 123.3 Zoning; and Aggregate Title Insurance Endorsement.

**Item 13** - ESCROW: Receive, hold and disburse to the party or parties entitled thereto amounts required to be deposited into escrow and/or disbursed in connection with the closing of each property transaction.

**Scenario 3:**

**Item 2b** – New preliminary report, including copies of all underlying exception & exclusion documents referenced. Judicial Council will not provide copy of existing title policy or preliminary report.

**Item 1** – Update to preliminary report, including copies of all underlying exception & exclusion documents referenced.

**Item 8** - Pro forma: Issue Pro Forma CLTA Title Policy based on a value of $30,000,000.

**Item 9** - Issue CLTA owner’s policy of title insurance for property with a value of $30,000,000, conveyed to the Judicial Council in fee together with appropriate title endorsements, including: CLTA 100 Comprehensive Coverage; CLTA 103.1A Encroachment Coverage; CLTA 103.4 Access through an Easement; CLTA 103.7 Access; CLTA 110.1 Deletion of Item from Policy; CLTA 116 Location; CLTA 116.1 Survey; CLTA 116.4 Contiguity; CLTA 116.7 Subdivision; CLTA 123.3 Zoning; and Aggregate Title Insurance Endorsement.

**Item 13** - ESCROW: Receive, hold and disburse to the party or parties entitled thereto amounts required to be deposited into escrow and/or disbursed in connection with the closing of each property transaction.

**Item 14** - CLOSING STATEMENTS: Prepare closing settlement statements reflecting pro-rations and funds disbursed through escrow in each property transaction.

**Scenario 4:**

**Item 2b** – New preliminary report, including copies of all underlying exception & exclusion documents referenced. Judicial Council will not provide copy of existing title policy or preliminary report.

**Item 1** – Update to preliminary report, including copies of all underlying exception & exclusion documents referenced.