|  |
| --- |
|  |
| Exhibit 4  Proposer Response Template  [Insert Company Name Here]  for  RFP NUMBER – FS-2019-04-LB  INTEGRATED WORKPLACE MANAGEMENT SYSTEM (IWMS) for FACILITIES SERVICES’  *Proposals Due: March 6th, 2020*  *NO LATER THAN 5:00 P.M. PACIFIC TIME* |

***TABLE OF CONTENTS***

[1 Introduction 3](#_Toc30056942)

[2 Proposer Information 3](#_Toc30056943)

[3 Company Profile and Background 3](#_Toc30056944)

[3.1 Company Overview and Financial Information **Error! Bookmark not defined.**](#_Toc30056945)

[4 Executive Summary 4](#_Toc30056946)

[5 Experience and Qualifications 4](#_Toc30056947)

[5.1 Resumes for Key Staff 4](#_Toc30056948)

[6 Response to Requirements 4](#_Toc30056949)

[6.1 Exhibit 1 - Business and Technical Requirements 4](#_Toc30056950)

[6.2 Exhibit 2 - Statement of Work (“SOW”) 4](#_Toc30056951)

[7 Supporting Documentation 6](#_Toc30056952)

[7.1 Acceptance of the Master Agreement 6](#_Toc30056953)

[7.2 Certifications, Attachments, and Other Requirements 6](#_Toc30056954)

[8 Supplemental Documentation 7](#_Toc30056955)

[8.1 Third-Party Product(s) 7](#_Toc30056956)

[9 Cost Data 7](#_Toc30056957)

[9.1 Exhibit 3, Cost Workbook 8](#_Toc30056958)

[10 Response Checklist 8](#_Toc30056959)

# Introduction

The designator, “[INSERT CONTENT HERE],” shall be replaced by the Proposer’s response content.

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

# Proposer Information

Company name:

Address:

Phone:

Fax:

Federal Tax Id:

Representative Name:

Title:

Address:

Phone:

E-mail:

# Company Overview and Financial Information

|  |  |
| --- | --- |
| **Company Information** | |
| **Company name** |  |
| **RFP Response lead/account executive name, title and contact information:** |  |
| **Industry (NAICS)**  *(North American Industry Classification System)* |  |
| **Most Recent FY company revenue** |  |
| **Most Recent Company Net Income** |  |
| **Headquarters Location** |  |
| **Date Founded** |  |
| **Company Ownership**  *(i.e. private/public, joint venture)* |  |
| **Number of years Proposer has been providing IWMS Implementation and User Training services** |  |
| **Provide a list of at least 20 clients including the number of users.**  **If the Proposer have less than 20 clients, then provide the full the list of clients.** |  |
| **Number of full-time employees:**  **Total Implementation services:** |  |
| **Service delivery locations within the continental United States** |  |
| **Provide the last 3 years of financial statements, (including Balance Sheet, Income Statement and Cash Flow Statements).** |  |
| **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’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]

## Resumes for Key Staff

For each Key Staff member, the Proposer must provide a resume 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, in detail, features and capabilities of the proposed application software and the Subscription Services offering. Proposed method for product implementation, data migration/integration, testing, and training services. This approach must describe the tasks and a detail schedule.

## Exhibit 1 - Business and Technical Requirements

Proposer must include its response to Exhibit 1

[INSERT CONTENT HERE]

## Exhibit 2 - Statement of Work (“SOW”)

Proposer must include its response to Exhibit 2

[INSERT CONTENT HERE]

### **Solution Implementation Approach**

Proposer shall provide recommended approach for implementation and the plan shall include the following:

#### Project Initiation and Planning (See SOW 2.0)

[INSERT CONTENT HERE]

#### System Design Phase (See SOW 3.0)

[INSERT CONTENT HERE]

#### Data Migration/Integration (See SOW 4.0)

[INSERT CONTENT HERE]

#### Development/Configuration (See SOW 5.0)

[INSERT CONTENT HERE]

#### Testing Services (See SOW 6.0)

[INSERT CONTENT HERE]

#### Training Services (See SOW 7.0)

[INSERT CONTENT HERE]

#### Deployment (See SOW 8.0)

[INSERT CONTENT HERE]

#### Post Implementation Support/Final Acceptance (See SOW 9.0)

[INSERT CONTENT HERE]

#### Subscription Services (See SOW 10.0)

[INSERT CONTENT HERE]

#### Maintenance and Operations Support Services (See SOW 11.0)

[INSERT CONTENT HERE]

#### Termination Assistances Services (See SOW 12.0)

[INSERT CONTENT HERE]

# Supporting Documentation

## Acceptance of the Master Agreement

Proposer’s Acceptance of Master Agreement

[INSERT CONTENT]

## Certifications, Attachments, and Other Requirements

### Provide California Seller’s Permit

[INSERT CONTENT]

### Provide proof of good standing and qualification to conduct business in California

[INSERT CONTENT]

### Provide business licenses, professional certifications, or other credentials.

[INSERT CONTENT]

### Proposer must complete the General Certifications Form

[INSERT CONTENT]

### Proposer must complete the Small Business Declaration

[INSERT CONTENT]

### Proposer must complete the Payee Data Record Form

[INSERT CONTENT]

### Proposer must complete the Iran Contracting Act Certification

[INSERT CONTENT]

### Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification

[INSERT CONTENT]

### Proposer must complete the Qualifications Reference Sheet, including any required documentation, in their Non-Cost Portion of their proposal.

[INSERT CONTENT]

# Supplemental Documentation

## Third-Party Product(s)

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 for the product.

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

The Proposer must also provide proof of their 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, which the Proposer deems applicable to their Proposal, should be placed in this section.

[INSERT CONTENT HERE]

# Cost Data

**The cost portion must be submitted in a separate, sealed and clearly identified envelope.**

## Exhibit 3, Cost Workbook

Proposer must complete all tabs in Exhibit 3, Cost Workbook

# Response Checklist

Please ensure all items listed below have been in included or addressed in provided RFP response to be considered as a viable solution for the JCC.

RFP Response Template (Exhibit 4)

Title Page

Table of Contents

Proposer Information

Included Proposer Company’s Name, Address, Telephone, and Fax numbers, and Federal identification number

Included Proposer’s representative’s Name, Title, Address, telephone, and Email Address

Financial Statements

Executive Summary

Company Overview

Proposer Experience and Qualifications

Resumes

Response to Requirements

Exhibit 1: Business and Technical Requirements

Exhibit 2: Statement of Work

Supporting Documentation

Included California Seller’s permit or certification of registration

Included proof of good standing and qualification to conduct business in California

Included current business license, professional certification or other credentials

Attachment 3: Completed Attachment 3, Proposer’s Acceptance of Master Agreement

Attachment 4: Completed Attachment 4, General Certifications

Attachment 5: Small Business Declaration ***only*** if it wishes to participate in the Small Business Incentive.

Attachment 6: Completed Attachment 6, Payee Data Record

Attachment 7: Completed Attachment 7, Iran Contracting Act Certification

Attachment 8: Completed Attachment 8, Unruh and FEHA Certification

Attachment 9: Completed Attachment 9, DARFUR Contracting Certification

Attachment 11: Completed Attachment 11, Qualifications Reference Sheet

Supplemental Document

Third Party Products

Cost Data

Exhibit 3: Cost Workbook