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| --- | --- |
|  | REQUEST FOR PROPOSALS   |
| ***[insert JBE name]*****Regarding:***[insert RFP title and RFP number]***PROPOSALS DUE:** *[insert date]* no later than *[insert time]* p.m. Pacific time  |

**1.0 BACKGROUND INFORMATION**

1.1 *[Add background information if desired.]*

**2.0 DESCRIPTION OF SERVICES AND DELIVERABLES**

The JBE seeks the services of a person or entity with expertise in *[complete the sentence with what type of expertise is needed].*

 *[Per JBCM chapter 4B, step 6.B this description should include:*

* *A clear, precise description of the work to be performed, services to be provided, problem to be solved, questions to be answered, issues to be addressed, or the goals and objectives to be met;*
* *An explanation of the desired approach to the problem, if any;*
* *Any requirements as to where the work must be performed (e.g., at the JBE’s site);*
* *A description of any specific functions, tasks, or activities that must be performed, in the order of importance and probable sequence, if applicable;*
* *Performance timelines or completion dates;*
* *Required quality control standards to be met, if applicable;*
* *A description of any required deliverables (such as progress reports or a final report summarizing a consultant’s findings);*
* *A description of the assistance to be provided by the JBE, if applicable;*
* *Acceptance criteria; and*
* *Practical and policy information, technological requirements or specifications, and legal limitations, if applicable.]*

*[Also include any specific warranty requirements.]*

**3.0 TIMELINE FOR THIS RFP**

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

| **EVENT** | **DATE** |
| --- | --- |
| RFP issued | *[insert date]* |
| Deadline for questions | *[insert date and time]* |
| Pre-proposal Conference | *[insert date and time, or delete if pre-proposal conference will not be held]* |
| Questions and answers posted | *[insert date]* |
| Latest date and time proposal may be submitted  | *[insert date and time;* ***must be same as the date and time on the coversheet!****]* |
| Anticipated interview dates (*estimate only*) | *[insert date(s), or delete if interviews will not be held]* |
| Evaluation of proposals (*estimate only*) | *[insert date]* |
| Notice of Intent to Award (*estimate only*) | *[insert date]* |
| Negotiations and execution of contract (*estimate only*) | *[insert date]* |
| Contract start date (*estimate only*) | *[insert date]* |
| Contract end date (*estimate only*) | *[insert date]* |

**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: JBE Standard Terms and Conditions | If selected, the person or entity submitting a proposal (the “Proposer”) must sign **[CHOOSE ONE**: this JBE Standard Form agreement **OR** a JBE Standard Form agreement containing these terms and conditions**]** (the “Terms and Conditions”). *[optional]* The following provisions within the Terms and Conditions are minimum contract terms and conditions (“Minimum Terms”): \_\_\_\_\_.  |
| 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.  *[optional]* **Note: A material exception (addition, deletion, or other modification) to a Minimum Term will render a proposal non-responsive. T****he JBE, in its sole discretion, will determine what constitutes a material exception.** |
| Attachment 4: General Certifications Form | The Proposer must complete the General Certifications Form and submit the completed form with its proposal. |
| Attachment 5: Darfur Contracting Act Certification | The Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal. |
| Attachment 6: Payee Data Record Form | This form contains information the JBE requires in order to process payments and must be submitted with the proposal. |
| ***[Only for solicitations of $1,000,000 or more]***Attachment 7: Iran Contracting Act Certification | The Proposer must complete the Iran Contracting Act Certification and submit the completed certification with its proposal. |
| ***[Only for solicitations of $100,000 or more]***Attachment 8: Unruh and FEHA Certification | The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification. |

**5.0 PAYMENT INFORMATION**

*[The JBE should consider addressing the following payment-related issues (as applicable):*

* *Basis for payments;*
* *Whether any expenses (including travel expenses) will be reimbursed by the JBE;*
* *Whether and to what extent progress payments will be allowed;*
* *Whether payments are subject to payment withholding;*
* *Penalties for late or inadequate performance; and*
* *Known or estimated budgetary limitations on the contract price.]*

**6.0 Pre-proposal Conference *[delete if not applicable]***

The JBE will hold a pre-proposal conference on the date identified in the timeline above. The pre-proposal conference will be held at the JBE’s offices at [*insert address*].

 **OPTION 1:** Attendance at the pre-proposal conference is **MANDATORY**. Each Proposer must be certain to check in at the pre-proposal conference, as the attendance list will be used to ascertain compliance with this requirement. The JBE will reject a proposal from any Proposer who did not attend the pre-proposal conference.

 **OPTION 2:** Attendance at the pre-proposal conference is optional. Proposers are strongly encouraged to attend.

**7.0 SUBMISSIONS OF PROPOSALS**

7.1 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.

7.2 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 \_\_\_\_\_\_ (\_\_\_) copies** of the technical proposal. The original must be signed by an authorized representative of the Proposer. The original technical proposal (and the copies thereof) must be submitted to the JBE in a single sealed envelope, separate from the cost proposal. 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 \_\_\_\_\_\_ (\_\_\_) 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 JBE 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. *[optional]* The Proposer must submit an electronic version of the entire proposal on CD-ROM *[optional]* or USB memory stick/flash drive. The files must be in PDF, Word, or Excel formats.

7.3 Proposals must be delivered by the date and time listed on the coversheet of this RFP to:

[*insert address*]

7.4 Late proposals will not be accepted.

7.5 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.

**8.0 PROPOSAL CONTENTS**

8.1 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. The Proposer’s name, address, telephone and fax numbers, and federal tax identification number. Note that if the 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 the 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 \_\_\_\_\_ (\_\_) clients for whom the Proposer has conducted similar services. The JBE may check references listed by the Proposer.

e. Proposed method to complete the work.

i. *[List specific aspects of the work that the evaluation team will consider when evaluating the Proposer’s method, if any. Examples include data collection methods, project/team organization, and time estimates.]*

ii. *[…]*

f. Acceptance of the Terms and Conditions.

i. On Attachment 3, the Proposer must check the appropriate box and sign the form. If the Proposer marks the second box, it must provide the required additional materials. An “exception” includes any addition, deletion, or other modification.

ii. If exceptions are identified, the Proposer must also submit (i) a red-lined version of the Terms and Conditions that implements all proposed changes, and (ii) a written explanation or rationale for each exception and/or proposed change.

iii. *[optional]* **Note: A material exception (addition, deletion, or other modification)to a Minimum Term will render a proposal non-responsive. The JBE, in its sole discretion, will determine what constitutes a material exception.**

g. Certifications, Attachments, and other requirements.

 i. The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.

ii. The Proposer must complete the Darfur Contracting Act Certification (Attachment 5) and submit the completed certification with its proposal.

iii. If Contractor is a California corporation, limited liability company (“LLC”), limited partnership (“LP”), or limited liability partnership (“LLP”), proof that Contractor is in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor conducts or will conduct (if awarded the contract) intrastate business in California, proof that Contractor is qualified to do business and in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor does not (and will not if awarded the contract) conduct intrastate business in California, proof that Contractor is in good standing in its home jurisdiction.

iv. *[optional]* Copies of the Proposer’s (and any subcontractors’) current business licenses, professional certifications, or other credentials.

v. *[optional]* Proof of financial solvency or stability (e.g., balance sheets and income statements).

vi. *[for solicitations of $1,000,000 or more]* The Proposer must complete the Iran Contracting Act Certification (Attachment 7) and submit the completed certification with its proposal.

vii. *[for solicitations of $100,000 or more]* The Proposer must complete the Unruh Civil Rights Act and California Fair Employment and Housing Act Certification (Attachment 8) and submit the completed certification with its bid.

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

i. A detailed line item budget showing total cost of the proposed services.

ii. A full explanation of all budget line items in a narrative entitled “Budget Justification.”

iii. 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.

**9.0 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 JBE reserves the right to negotiate extensions to this period.

**10.0 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 JBE 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.

If a contract will be awarded, the JBE will post an intent to award notice at \_\_\_\_\_\_\_\_\_\_\_\_\_.

| **CRITERION*****NOTE: These are sample criteria. The actual criteria used should be tailored to the specific procurement.*** | **maximum number of points** |
| --- | --- |
| *Quality of work plan submitted* | *[insert number of points]* |
| *Experience on similar assignments* | *[insert number of points]* |
| *Cost*  | *[insert number of points—generally at least 30% of the total points ]* |
| *Credentials of staff to be assigned to the project* | *[insert number of points]* |
| *Acceptance of the*  *Terms and Conditions* | *[insert number of points]* |
| *Ability to meet timing requirements to complete the project* | *[insert number of points]* |

**11.0 INTERVIEWS**

The JBE 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 JBE’s offices. The JBE will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The JBE will notify eligible Proposers regarding interview arrangements.

**12.0 CONFIDENTIAL OR PROPRIETARY INFORMATION**

**Proposals are subject to disclosure TO THIRD PARTIES AND MEMBERS OF THE PUBLIC pursuant to applicable LAWS, INCLUDING PUBLIC DISCLOSURE PURSUANT TO rule 10.500 of the California Rules of Court.** Except as required by law, the JBE will not disclose (i) social security numbers, or (ii) balance sheets or income statements submitted by a Proposer that is not a publicly-traded corporation. All other information in proposals may be disclosed in response to applicable public records requests, or as otherwise required by law. Such disclosure may be made regardless of whether the proposal (or portions thereof) is marked “confidential,” “proprietary,” “copyright ©,” or otherwise, and regardless of any statement in the proposal (a) purporting to limit the JBE’s right to disclose information in the proposal, or (b) requiring the JBE to inform or obtain the consent of the Proposer prior to the disclosure of the proposal (or portions thereof). Any proposal that is password protected, or contains portions that are password protected, may be rejected. Submission of any proposal pursuant to this RFP constitutes acknowledgment and consent by the Proposer to the potential public disclosure of its proposal content, pursuant to this Section 12.0. **Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.**

**13.0 DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE**

*[The JBE should include its standard language regarding the DVBE incentive. If applicable, the JBE may instead state “The JBE has waived the DVBE incentive in this solicitation.”]*

**14.0 PROTESTs**

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contracting 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 JBE to receive a solicitation specifications protest is **[CHOOSE ONE**: the proposal due date **OR** *[insert an earlier date]***]**. Protests must be sent to:

 [*insert name and address*]