Price Proposal FORM

The Price Proposal consists of the following two parts, Part 1 Price Proposal, and Part 2 Pricing Scenarios.

**A. PART 1 - PRICE PROPOSAL**

In this part of the Price Proposal, Proposer will list its proposed pricing for each of the individual services described in Attachment A - Scope of Services. If the Proposer is awarded a Master Agreement with the Judicial Council, these prices will be the contract pricing included in Exhibit D of the Master Agreement.

The price applicable to a Service may be a Fixed Price, or may consist of an Actual Cost, a Minimum Charge, an Hourly Rate, another form of Rate, or some combination applicable to the pricing of a Service.

Complete the pricing table below in accordance with the following:

If you plan to use Subcontractors, enter the prices that you will charge for the Work of your Subcontractors in the table, with any markup you intend to charge already included in the price you submit (e.g. if a Fixed Price charged by your Subcontractor is $60 and you intend to charge an additional 10%, submit the price as $66). The only exception to this rule is in the Actual Cost column – see below for instructions. Subcontractor names are not to be provided.

**Actual Cost**

Is the pricing of the Service, or a component of the pricing of the Service, dependent on Actual Costs expended by Contractor or Subcontractor in performing the Service? See the Master Agreement for a definition of Actual Cost.

* + If yes, complete this column with a “Yes” response.
  + If no, leave the column blank.
  + If this Service is being provided by a Subcontractor and you intend to apply a markup to your Subcontractor’s Actual Cost, enter “Yes” and provide the percentage markup in the format of “+X%”.

Since the Actual Cost can only be determined at the time the Service is provided, do not provide a dollar amount in this column.

**Fixed Price**

Is this Service provided at a flat fee or fixed price, with no other charges applicable? If yes, enter the fixed price in dollars. If a Fixed Price is entered, the Actual Cost, Minimum Charge, Hourly Rates, and Other Rate columns are to be left blank.

**Minimum Charge Plus**

Does the pricing for this Service include a fixed price plus another charge applied on the basis of an Actual Cost, at Hourly Rates, or at any other type of rate? If so, enter the fixed price that constitutes the Minimum Charge in dollars and provide additional pricing information in the applicable Actual Cost, Hourly Rate(s), or Other Rate column. The Fixed Price column must be left blank. See the Master Agreement for a definition of Minimum Charge.

**Hourly Rate or Rates**

Is the pricing of the Service or a component of the price of the Service based on Hourly Rate(s) charged for hours worked by employees? If so enter the Position Title(s) and Hourly Rates(s) that will apply. If multiple Position Titles are used, enter multiple Titles and Rates. If you are using a Subcontractor to provide the work, the title(s) and rate(s) of the Subcontractor employee(s) providing the Work must be provided here.

**Other Rate Not Based on Hours**

Is the pricing of the Service, or a component of the price of the Service, based on a Rate structure other than Hourly Rate(s) charged for hours worked by employees? If so, enter the basis for calculation of the price based on the Rate.

**Pricing Table**

Note: Not all Judicial Council orders will result in the opening of an escrow, and/or issuance of a policy of title insurance. If any of the prices you list below are included in the price of an issued policy (i.e., the charges are waived or credited back), please indicate this in the table.

| **No.** | **Service Description** | **Actual Cost** | **Fixed Price** | **Minimum Charge** | **Hourly Rate or Rates** | | **Other Rate (Not Based on Hours)** |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Instructions: | Yes\* or Leave Blank | In $ | In $ | Position Title  Job Title | Rate in $/hr | $ per \_\_\_\_\_ |
| 1. | Update to preliminary report including copies of all underlying exception & exclusion documents referenced. |  |  |  |  |  |  |
| 2a. | New preliminary report including copies of all underlying exception & exclusion documents referenced. Judicial Council will provide a copy of an existing title policy. |  |  |  |  |  |  |
| 2b. | New preliminary report including all underlying exception & exclusion documents referenced. Judicial Council will not provide a copy of an existing title policy. |  |  |  |  |  |  |
| 3. | Provide other related information & 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 |  |  |  |  |  |  |
| 4a. | Chain of Title going back 30 yrs. |  |  |  |  |  |  |
| 4b. | Chain of Title going back beyond 30 yrs. |  |  |  |  |  |  |
| 5. | Issue litigation guarantees upon request. |  |  |  |  |  |  |
| 6a. | Assist Judicial Council and its consultants with the development of legal descriptions for Public and private properties. |  |  |  |  |  |  |
| 6b. | Assist Judicial Council and its consultants with the development of legal descriptions for unrecorded easements, rights of way or other apparent encumbrances or rights. |  |  |  |  |  |  |
| **7. Marketable Title:** Assist Judicial Counciland 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 if 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 |  |  |  |  |  |  |
| 7d. | Provide additional services on an "as needed" basis. |  |  |  |  |  |  |
| 8. | Issue pro forma Title Policies upon request by Judicial Council. Judicial Council will designate the type of policy and amount of insurance required |  |  |  |  |  |  |
| 9. | Issue CLTA, or ALTA extended-coverage 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: | | | | | | |
| 9a. | CLTA 100 Comprehensive Coverage |  |  |  |  |  |  |
| 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 quoted on as needed basis |  |  |  |  |  |  |
| 10. | Provide 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 Judicial Council) which your firm has insured or will insure. Please provide the premiums charged per each $1,000 of coverage |  |  |  |  |  |  |
| 11./12. | Record grant deeds, easements, memoranda of agreements and related documents required with respect to transfer of title to, or other insurable interest in, each property in the office of the County Recorder for county in which property is located, even if recordation is not in connection with of an open escrow or with issuance of a policy (“courtesy recording”). Distribute to the parties copies (as appropriate) of executed and/or recorded closing documents. |  |  |  |  |  |  |
| 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. | Escrow – 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. | Additional Services\*\* | N/A | N/A | N/A |  |  | N/A |

\* “Actual Cost” is a defined term in the Master Agreement posted to the California Courts website for this RFP.

\*\* Provide Hourly rates for all Personnel Titles that you might ever conceivably use to provide Additional Services. Additional positions and rates cannot be added once the Master Agreement has been signed.

**B. PART 2 - PRICE SCENARIOS**

Below are seven (7) 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. The Judicial Council will award points for the Proposer’s order totals using the methodology described in section C below.

**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. Be complete when showing the calculation method. If the Judicial Council cannot understand how the total order cost of a Scenario was determined, or if your method of calculation is not in accord with or does not utilize the prices given in the Pricing Table, your Price Proposal will be deemed unresponsive and your Proposal will not receive further consideration. The item numbers included below are the item numbers in Attachment A – Scope of Services.

**Scenario 1**

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

**Scenario 2**

**Item 2a** - New preliminary report, including copies of all underlying exception & exclusion documents referenced. Judicial Council will provide copy of existing title policy.

**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.

**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.

**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 11** - RECORD DOCUMENTS: Record grant 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.

**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 5**

*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.

**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 6:**

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

**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 11** - RECORD DOCUMENTS: Record grant 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.

**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 7:**

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

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

**Item 11** - RECORD DOCUMENTS:  Record grant 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 though not the subject of an open escrow, and no policy will be issued (“courtesy recording”).

**C. METHODOLOGY FOR SCORING PRICING**

The Judicial Council’s Business Services unit will evaluate and score each Proposer’s pricing provided in Part 2 – Price Scenarios:

1. Each price scenario is weighted as follows:

| **Scenario** | **Description** | **Weight** |
| --- | --- | --- |
| 1 | Updated Preliminary Report | 60 |
| 2 | New Prelim, existing policy provided | 16 |
| 3 | New Prelim, existing policy not provided | 16 |
| 4 | $850,000 value. New Prelim & update; pro forma, policy, recording, escrow, closing statement | 2 |
| 5 | $10M value. New Prelim & update; pro forma, policy, escrow | 2 |
| 6 | $30M value. New Prelim & update; pro forma, policy, recording, escrow, closing statement | 2 |
| 7 | New Prelim & update, record documents even though no policy or escrow required | 2 |
|  |  | **100** |

For each Proposer, the total cost of each order scenario will be multiplied by the applicable weight above and the weighted totals for all six scenarios will be added together to come up with a single total dollar amount (“**Total Price**”).

2. The Proposal with the lowest Total Price is assigned the maximum number of cost points.

3. The worksheet below will be used to calculate the number of cost points to be assigned to each Proposer’s Total Price. The percentage weight assigned to pricing is 30% as shown in line 6 of the worksheet below.

**WORKSHEET:**

|  |  |
| --- | --- |
| Line 1 Maximum number of cost points | 30 |
| Line 2 Dollar amount of the lowest proposal | $\_\_\_\_\_\_\_\_\_\_\_ |
| Line 3 Dollar amount of the proposal being evaluated | $\_\_\_\_\_\_\_\_\_\_\_ |
| Line 4 Result of dividing the number in line 2 by the number in line 3 | \_\_\_\_\_\_\_\_\_\_\_ |
| Line 5 Result of multiplying the number in line 1 by the number in line 4 | \_\_\_\_\_\_\_\_\_\_\_ |
| Line 6 Number in line 5 rounded to the nearest whole number | \_\_\_\_\_\_\_\_\_\_\_ |

**Example: Proposer A Total Price - $90,000; Proposer B Total Price - $98,000; Proposer C Total Price - $80,000**

**In this example, Proposer C submitted the lowest Total Price and is awarded the maximum 30 points.**

Proposer A is assigned 27 cost points, as shown below:

Line 1 - 30

Line 2 - $80,000

Line 3 - $90,000

Line 4 – 0.8889

Line 5 – 26.67

Line 6 - 27

Proposer B is assigned 24 cost points, as shown below:

Line 1 - 30

Line 2 - $80,000

Line 3 - $98,000

Line 4 - 0.8163

Line 5 - 24.49

Line 6 - 24