



# REQUEST FOR PROPOSALS

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**JUDICIAL COUNCIL OF CALIFORNIA**

**REGARDING: COORDINATE 2018 COURT INVOLVED VETERANS AND MILITARY FAMILIES SUMMIT**

**RFP TITLE: 2018 CALIFORNIA VETERANS COURTS SUMMIT**

**RFP NUMBER: CFCC-2018-04-CD**

**PROPOSALS DUE:**  
APRIL 16, 2018 NO LATER THAN 3 PM PACIFIC TIME

## **1.0 BACKGROUND INFORMATION**

### **1.1 Background**

The Judicial Council of California (JCC), Center for Families, Children & the Courts (CFCC), has received funding to hire a coordinator to organize, fund and hold a one-day Court Involved Veterans and Military Families Summit. The goals of the Court Involved Veterans & Military Families Summit are to 1) convene stakeholders from existing Veterans Courts (judges, lawyers, providers, etc.), as well as potential new collaborators (funders, Continuum of Care/Coordinated Entry partners, associations/organizations), for a facilitated and purposeful exchange of information related to a select number of critical issues and innovations, including taking a families system approach to serving veterans and military families; and 2) encourage and support the establishment and expansion of courts addressing the unique needs of veterans and military families in California.

### **1.2 Court Involved Veterans and Military Families Summit**

- This will be an invitation-only summit for stakeholders working with Veterans Courts and other collaborative courts seeking to better meet the unique needs of veterans and their families, preferably held in conjunction with another collaborative justice related training in order to maximize attendance and exposure,
- The JCC seeks to identify and retain a qualified service provider to coordinate the 2018 Court Involved Veterans and Military Families Summit to be held in Northern California. This RFP is the means for prospective service providers to submit their qualifications to the JCC.

## **2.0 DESCRIPTION OF SERVICES AND DELIVERABLES**

- 2.1 The JCC seeks to identify and retain a California Collaborative Court organization or staff, to coordinate and organize the event in Northern California, including funding the venue and activity expenses related to the event. This RFP is the means for prospective professionals to submit their qualifications to the JCC for the Court Involved Veterans and Military Families Summit.
- 2.2 Services are expected to be performed by the Coordinator between May 20, 2018 and December 31, 2018 with the Court Involved Veterans and Military Families Summit event occurring in **September 12-14, 2018** in Sacramento, California.
- 2.3 Research, identify, and subcontract with a Northern California facility as the venue for the Court Involved Veterans and Military Families Summit;

- 2.4 Participate in conference calls with the planning committee members throughout the planning process. These phone calls will increase to a more frequent basis at approximately two months out from the event;
- 2.5 Coordinate and oversee marketing and publicity for this event. This may include electronic mailing of flyers to Veterans Courts and collaborative justice court coordinators, or others who would be interested in attending this event, and any other means of marketing deemed appropriate for this event;
- 2.6 Interact and work closely with Special Events staff at the venue to coordinate lodging for guests and attendees during the event;
- 2.7 Interact and work closely with Special Events staff at the venue to coordinate group meals to participants for entire length of event, including breaks/snacks;
- 2.8 Interact and work closely with Special Events staff at the venue to coordinate logistics of the event e.g. (parking, signage, reserving rooms for workshops, rental of AV equipment, any IT personnel needed to operate equipment);
- 2.9 Research, coordinate, and book guest speakers and workshop presenters as appropriate for the Court Involved Veterans and Military Families Summit, making sure that workshops and speakers present information that is relevant to Veterans Courts and will encourage courts throughout the state to improve case processing for veterans and military families;
- 2.10 Coordinate and oversee printing of all materials relevant to the Summit i.e. brochures, flyers, programs and agendas;
- 2.11 Interact and work closely with JCC staff to stay informed as to the progress of the event's coordination;
- 2.12 Coordinator will negotiate, execute, and liquidate the contract with the venue;
- 2.13 Coordinator will maintain a safe and organized event, resolving any potential issues or problems that may arise, such as, logistical issues or issues regarding guest speakers or workshop faculty;
- 2.14 Submit payment to the venue and reconcile expenses at the end of the event and provide JCC all documentation relevant to the Court Involved Veterans and Military Families Summit (e.g. total number of attendees, total amount received and total expenses).

### 3.0 TIMELINE FOR THIS RFP

3.1 The JCC has developed the following timeline of key events from the time of the issuance of this RFP through the intent to award contract. All dates are subject to change at the discretion of the JCC.

<b>EVENT</b>	<b>DATE</b>
RFP issued	<b>March 13, 2018</b>
Deadline for questions to: <a href="mailto:Solicitations@jud.ca.gov">Solicitations@jud.ca.gov</a>	<b>March 27, 2018 by 3:00 p.m.</b>
Questions and answers posted ( <i>estimate only</i> )	<b>April 5, 2018</b>
Latest date and time proposal may be submitted to: Solicitations@jud.ca.gov	<b>April 16, 2018 by 3:00 p.m.</b>
Evaluation of proposals ( <i>estimate only</i> )	<b>April 23-27, 2018</b>
Notice of Intent to Award ( <i>estimate only</i> )	<b>May 2, 2018</b>
Negotiations and execution of contract ( <i>estimate only</i> )	<b>May 3-17, 2018</b>
Contract start date ( <i>estimate only</i> )	<b>May 20, 2018</b>
Contract end date ( <i>estimate only</i> )	<b>December 31, 2018</b>

**4.0 RFP ATTACHMENTS**

The following attachments are included as part of this RFP:

<b>ATTACHMENT</b>	<b>DESCRIPTION</b>
Attachment 1: Administrative Rules Governing RFPs (Non-IT Services)	These rules that govern this solicitation.
Attachment 2: Judicial Council Standard Agreement Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must sign this Judicial Council Services – Standard Agreement.
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: 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 Judicial Council requires in order to process payments and must be submitted with the proposal.
Attachment 7: Reference Form	The Proposer must complete and return this form with its proposal

**5.0 PAYMENT INFORMATION**

The resulting contract will be comprised of firm fixed pricing for completion of each of the identified deliverables listed below.

<b>Deliverable(s)</b>	<b>Estimated Due Date</b>	<b>Not to Exceed Amount</b>
<b>First Deliverable:</b> Pre-Planning stage <ul style="list-style-type: none"> <li>a. Research and identify viable location for Veterans Court Summit in California.</li> <li>b. Meet with conference services at the established location to discuss logistics, costs, and services available.</li> <li>c. Discuss with Planning Committee on regularly scheduled conferences calls, the potential location, costs, and services offered by venue. Provide the</li> </ul>	June 20, 2018	\$

<p>Judicial Council, CFCC with copies of conference call agendas.</p> <p>d. Furnish the Judicial Council, CFCC with an executed contract between Contractor and venue, which shall include information on the costs of services such as, but not limited to, the lodging, meals, and snacks.</p>		
<p><b>Second Deliverable:</b> Planning stage</p> <p>a. Submit a copy of the draft agenda for the summit.</p> <p>b. Provide the Judicial Council, CFCC with information on research, coordination and booking of guest speaker(s).</p> <p>c. Continue planning committee conference calls to discuss final planning stages. Furnish the Judicial Council, CFCC with copies of the agenda from the conference calls.</p> <p>d. Provide the Judicial Council, CFCC with workshop descriptions and faculty names. If requested by JCC contractor may be required to provide executed agreement(s) between their subcontractors</p>	<p>July 20, 2018</p>	<p>\$</p>
<p><b>Third Deliverable:</b> Post event</p> <p>a. Provide the Judicial Council, CFCC with the number of all registered attendees</p> <p>b. Submit a report to Judicial Council, CFCC that includes the final number of attendees, final program, and any issues that arose during the summit and how those issues were resolved.</p> <p>c. Submit copies of evaluations from the summit for future review and reference.</p>	<p>November 1, 2018</p>	<p>\$</p>

## 6.0 SUBMISSIONS OF PROPOSALS

- 6.1 The Proposer shall provide their point of contact, including name, physical and electronic addresses, and telephone and facsimile numbers in a cover letter.

Proposals should provide 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.

- 6.2 The Proposer must submit **one (1) original and three (3) copies** of the proposal. The original must be signed by an authorized representative of the Proposer. The original proposal (and the copies thereof) must be submitted

to the Judicial Council in a single sealed envelope. The Proposer must write the RFP title and number on the outside of the sealed envelope.

Proposers are also required to submit an electronic version of the entire proposal on USB memory stick/flash drive. The files must be in PDF, Word, or Excel formats.

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

Judicial Council of California  
Branch Accounting and Procurement | Administrative Division  
Attn: Lenore Fraga-Roberts, **RFP: CFCC-2018-04-CD**  
455 Golden Gate Avenue, 6th Floor  
San Francisco, CA 94102-3688

Late proposals will not be accepted.

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.

## 7.0 PROPOSAL CONTENTS

- 7.1 Non-Cost Proposal. The following information must be included in the 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. Provide a resume for each key personnel. The resume should describe the individual's background and subject matter experience, as well as the individual's ability and experience in conducting the proposed activities.
  - d. Provide references of names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Proposer has conducted similar services. The Judicial Council may check references listed by the Proposer. See **Attachment 7, References Form**.
  - e. Proposed method to complete the work.

- i. Explain your method and/or tasks on completing the project. What methods will be used to facilitate the summit?
  - ii. Provide an overall plan with time estimates from the start to the completion of the summit. This plan should be in WORD or EXCEL format.
  - iii. Explain the methods that will be used to present the course materials to the participants, including marketing and publicity for the event. (PowerPoint, handouts, etc.)
  - iv. If applicable, describe Proposer's method in preparation of a final summary of the summit, such as, but not limited to, evaluations, lessons learned, and proposed enhancements.
  - v. Provide a sample of a Proposer's Evaluation forms used for similar type projects.
  - vi. Provide the selection process for Workshop Presenters and Guest Speakers.
- 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 redlined 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.
- g. Certifications, Attachments, and other requirements.
- i. The Proposer must complete and submit all attachments as described in Section **4.0 RFP Attachments**.
  - ii. If Proposer is a California corporation, limited liability company ("LLC"), limited partnership ("LP"), or limited liability partnership ("LLP"), proof that Proposer is in good standing in California. If Proposer is a foreign corporation, LLC, LP, or LLP, and Proposer conducts or will conduct (if awarded the contract) intrastate business in California, proof that Proposer is qualified to do business and in good standing in California. If Proposer is a foreign corporation, LLC, LP, or LLP, and Proposer does not (and will not if awarded the contract) conduct intrastate business in California, proof that Proposer is in good standing in its home jurisdiction.



- iii. Copies of the Proposer’s (and any subcontractors’) current business licenses, professional certifications, or other credentials.

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

<b>Deliverable(s)</b>	<b>Estimated Due Date</b>	<b>Not to Exceed Amount</b>
<p><b>First Deliverable:</b> Pre-Planning stage</p> <ul style="list-style-type: none"> <li>a. Research and identify viable location for Veterans and Military Families Court Summit in California.</li> <li>b. Meet with conference services at the established location to discuss logistics, costs, and services available.</li> <li>c. Discuss with Planning Committee on regularly scheduled conferences calls, the potential location, costs, and services offered by venue. Provide the Judicial Council, CFCC with copies of conference call agendas.</li> <li>d. Furnish the Judicial Council, CFCC with an executed contract between Contractor and venue, which shall include information on the costs of services such as, but not limited to, the lodging, meals, and snacks.</li> </ul>	June 20, 2018	\$
<p><b>Second Deliverable:</b> Planning stage</p> <ul style="list-style-type: none"> <li>a. Submit a copy of the draft agenda for the summit.</li> <li>b. Provide the Judicial Council, CFCC with information on research, coordination and booking of guest speaker(s).</li> <li>c. Continue bi-weekly planning committee conference calls to discuss final planning stages. Furnish the Judicial Council, CFCC with copies of the agenda from the conference calls.</li> <li>d. Provide the Judicial Council, CFCC with workshop descriptions and faculty names. If requested by JCC contractor may be required to provide executed agreement(s) between their subcontractors</li> </ul>	July 20, 2018	\$
<p><b>Third Deliverable:</b> Post event</p> <ul style="list-style-type: none"> <li>a. Provide the Judicial Council, CFCC with the number of all registered attendees.</li> <li>b. Submit a report to Judicial Council, CFCC that includes the final number of attendees, final program,</li> </ul>	November 1, 2018	

<p>and any issues that arose during the summit and how those issues were resolved.</p> <p>c. Submit copies of evaluations from the summit for future review and reference.</p>		
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- i. As a separate document, submit a detailed line item budget showing total cost of the services for each Deliverable. Fully explain and justify all budget line items in a narrative entitled “Budget Justification.” The budget should include estimated program costs including summit lodging and activities, as well as other anticipated costs that will be incurred in the coordination of the Veterans Court Summit.
- ii. The total costs for services, (Deliverable 1, 2, and 3) will not exceed **\$20,000.00** and are inclusive of all lodging, activity costs, personnel, materials, computer support, travel, per diem, and overhead rates. The method of payment to the coordinator will be by cost reimbursement.

**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.

**8.0 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 Judicial Council reserves the right to negotiate extensions to this period.

## 9.0 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 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 Judicial Council will post an intent to award notice on the Judicial Council's Courts Bidders/Solicitations website:  
<http://www.courts.ca.gov/rfps.htm>.

CRITERION	MAXIMUM NUMBER OF POINTS
Quality of work plan submitted	15
Experience on similar assignments, including working with California Veterans Courts	20
Cost	30
Ability to hold Summit in conjunction with related trainings or conferences	15
Acceptance of the Terms and Conditions	10
Ability to meet timing requirements to complete the project	10

## 10.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

**PROPOSALS ARE SUBJECT TO DISCLOSURE PURSUANT TO APPLICABLE PROVISIONS OF THE CALIFORNIA PUBLIC CONTRACT CODE AND RULE 10.500 OF THE CALIFORNIA RULES OF COURT.** The Judicial Council 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 will be disclosed in response to applicable public records requests. Such disclosure will be made regardless of whether the proposal (or portions thereof) is marked "confidential," "proprietary," or otherwise, and regardless of any statement in the proposal (a) purporting to limit the Judicial Council's right to disclose information in the proposal, or (b) requiring the Judicial Council 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. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

## **11.0 DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION GOALS**

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

## **12.0 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](http://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 to receive a solicitation specifications protest is the proposal due date. Protests must be sent to:

Judicial Council of California – Branch Accounting and Procurement  
Attn: Protest Officer  
455 Golden Gate Avenue, 6<sup>th</sup> Floor  
San Francisco, CA 94102-3688  
*(Indicate Solicitation Number and Name of Your Firm on lower left corner of envelope.)*