**Submission Form for Technical Proposal**

|  |  |
| --- | --- |
| Proposer’s (Legal Name): |  |
| Address: |  |
| Address Line 2: |  |
| City, State, Zip code |  |
| Contact: |  |
| Title: |  |
| Phone Number: |  |
| Fax Number: |  |
| Email Address: |  |
| Federal Tax ID Number: |  |

In order for a proposal to be considered responsive and acceptable for evaluation by the Judicial Council, the proposal must contain the following information and be submitted according to the following guidelines.

Proposal format must be as follows:

1. Number your responses exactly as numbered below and in the same sequential order.
2. Restate the Judicial Council’s questions or required information.
3. Provide your response.

Responsive proposals should provide straightforward, concise information addressing the requirements. Expensive bindings and color displays, for example, are neither necessary, nor desired. Emphasis should be placed on providing responses and materials that conform to the Judicial Council’s instructions and are clear and complete responses (see RFP section 6.0 for additional detail on regarding Proposal Contents).

**1.0** List proposer’s full legal name and any names used, and provide current business licenses, professional certifications, and other credentials.

**2.0 KEY PERSONNEL AND SERVICE AREAS**

**2.1** Describe the key personnel you propose to assemble to manage the Judicial Council account, perform the appraisal work, and handle the daily order processing/tracking, invoicing and related contract administration.

**2.2** Provide résumés describing the background and experience of the key personnel you intend to assign for the performance of the Services or Work, describing each individual’s ability and experience in conducting the proposed activities.

**2.3** For each of the fifty-eight (58) counties in the state, indicate if your firm is, or is not, able to provide the required services outlined in **RFP Section 3.0 - Scope of Services**. For each county, indicate if your firm is able to meet the Judicial Council’s requirement for the use of a local appraiser and, if so, whether this would be accomplished directly or through the use of subcontractors. If use of subcontractors would be required, include the subcontractor’s full legal name and contact information. If you have a currently-existing relationship with a subcontractor, please provide a resume or statement of qualifications for that subcontractor.

| **COUNTY BY COUNTY SERVICE LIST** | | | |
| --- | --- | --- | --- |
| **If services were provided in last twelve (12) months, indicate if said services were provided directly by the Service Provider or through a subcontractor.** | | | |
| **County** | **Services Provided in Last 12 Months? (YES/NO)** | **Direct**  **(Check Box)** | **Subcontracted**  **(Check Box)** |
| (1) Alameda |  |  |  |
| (2) Alpine |  |  |  |
| (3) Amador |  |  |  |
| (4) Butte |  |  |  |
| (5) Calaveras |  |  |  |
| (6) Colusa |  |  |  |
| (7) Contra Costa |  |  |  |
| (8) Del Norte |  |  |  |
| (9) El Dorado |  |  |  |
| (10) Fresno |  |  |  |
| (11) Glenn |  |  |  |
| (12) Humboldt |  |  |  |
| (13) Imperial |  |  |  |
| (14) Inyo |  |  |  |
| (15) Kern |  |  |  |
| (16) Kings |  |  |  |
| (17) Lake |  |  |  |
| (18) Lassen |  |  |  |
| (19) Los Angeles |  |  |  |
| (20) Madera |  |  |  |
| (21) Marin |  |  |  |
| (22) Mariposa |  |  |  |
| (23) Mendocino |  |  |  |
| (24) Merced |  |  |  |
| (25) Modoc |  |  |  |
| (26) Mono |  |  |  |
| (27) Monterey |  |  |  |
| (28) Napa |  |  |  |
| (29) Nevada |  |  |  |
| (30) Orange |  |  |  |
| (31) Placer |  |  |  |
| (32) Plumas |  |  |  |
| (33) Riverside |  |  |  |
| (34) Sacramento |  |  |  |
| (35) San Benito |  |  |  |
| (36) San Bernardino |  |  |  |
| (37) San Diego |  |  |  |
| (38) San Francisco |  |  |  |
| (39) San Joaquin |  |  |  |
| (40) San Luis Obispo |  |  |  |
| (41) San Mateo |  |  |  |
| (42) Santa Barbara |  |  |  |
| (43) Santa Clara |  |  |  |
| (44) Santa Cruz |  |  |  |
| (45) Shasta |  |  |  |
| (46) Sierra |  |  |  |
| (47) Siskiyou |  |  |  |
| (48) Solano |  |  |  |
| (49) Sonoma |  |  |  |
| (50) Stanislaus |  |  |  |
| (51) Sutter |  |  |  |
| (52) Tehama |  |  |  |
| (53) Trinity |  |  |  |
| (54) Tulare |  |  |  |
| (55) Tuolumne |  |  |  |
| (56) Ventura |  |  |  |
| (57) Yolo |  |  |  |
| (58) Yuba |  |  |  |

**3.0 REQUIRED APPRAISAL SERVICES**

**3.1 General Report Requirements,** per RFP Section 3.0, Scope of Services, Article 3.3 Required Appraisal Services. **Indicate if your firm can provide each of the types of appraisal reports and services described herein:**

* + - * 1. Types of Properties

i. Land

ii. Land + Improvements

* + - * 1. Types of Reports

i. Restricted Use Appraisal Report;

ii. Appraisal Report;

* + - * 1. Approaches required:

i. Sales Comparison

ii. Cost

iii. Income

iv. Combination of above

v. Alternative approaches for Special Use properties

1) Use Value

2) Going Concern Value

3) Combination of above

d. Types of Services:

i. New appraisal report.

ii. New appraisal report – Judicial Council provides a recent appraisal report from another firm.

iii. Multiple new appraisal reports for properties in the same vicinity being appraised concurrently, thereby affording Service Provider certain economies of scale.

iv. Update of a previous Service Provider appraisal report, to reflect current market conditions.

v. Update of a previous Service Provider appraisal report to reflect expanded scope.

vi. Update of a previous Service Provider appraisal report to reflect reduced scope.

vii. Update of a previous Service Provider appraisal report to change approach used.

viii. New Commission appraisal report to determine real estate brokerage market commission rates.

ix. Other types of appraisal reports as specifically requested (e.g., partial interest valuation; valuation of a development restriction on an adjoining property, etc.).

**3.2 State of California Department of General Services Report Requirements**

* + 1. DGS Appraisal Specifications: For Appraisal Reports, indicate if your firm can meet all requirements contained in the DGS Specifications as described in **Attachment A-1**. If your firm is not able to meet the requirement(s), briefly explain why, noting any concerns or issues we should be aware of. If your firm is able to meet the requirements, provide further details, as appropriate, on how your firm plans to do so, including use of subcontractors.
    2. DGS Implied Dedication: For Appraisal Reports, indicate if your firm can meet the DGS Implied Dedication requirement as described in **Attachment A-2**. If your firm is not able to meet the requirement(s), briefly explain why, noting any concerns or issues we should be aware of. If your firm is able to meet the requirement, provide further details, as appropriate, on how your firm plans to do so, including use of subcontractors.

**3.3**  **Additional Judicial Council Report Requirements**

a. Property Depiction: Indicate if your firm can meet this requirement as described in **RFP Section 3.0, Scope of Services, Article 3.5(a)**.

b. DGS Preference for Local Appraisers: Indicate if your firm can meet the requirement described in **RFP Section 3.0, Scope of Services, Article 3.5(b)**. Describe in detail how this requirement can be met. If your firm cannot meet this requirement, please explain.

c. Regional Area, neighborhood analyses: Indicate if your firm can meet the requirement as described in **RFP Attachment A-1, DGS Appraisal Specifications, Section 13.** Describe in detail how this requirement can be met. If your firm cannot meet this requirement, please explain.

d. Real estate data and analyses: Indicate if your firm can meet the requirement as described in **RFP Attachment A-1, DGS Appraisal Services, Section 14**. Describe in detail how this requirement can be met. If your firm cannot meet this requirement, please explain.

**4.0 CONTRACT ADMINISTRATION REQUIREMENTS**

**4.1 Review the following Contract Administration requirements and confirm Proposer’s acceptance of these requirements. If any requirement is not accepted, please explain.**

a. Service Work Order Authorization Process as defined in **Attachment D, Appendix A, Article 2.8**

b. Delivery/Approval of reports by Judicial Council as described in **RFP Section 3.0 - Scope of Services, Article 3.6.**

c. Approval of Appraisal Reports by DGS as described in **RFP Section 3.0 – Scope of Services, Article 3.7.**

i. Report rejected by DGS for non-conformance to requirements, as described in **RFP Section 3.0, Scope of Services 3.7(a)**.

ii. Report rejected by DGS for other reasons: as described in **RFP Section 3.0, Scope of Services, 3.7(b)**

**4.2 Administrative Services to be provided at no charge to Judicial Council**

* 1. Status Reports: If the Judicial Council requests periodic order status reports, describe what details would be included on the reports, how the reports would be produced, and indicate if reports will be provided at no charge. Indicate who on your firm’s staff (name/title) would be creating, updating, and providing these to the Judicial Council.
  2. Copies of Reports/Delivery: Indicate if up to four (4) (specific number to be provided by Judicial Council on each request) hard-copy bound reports with original signatures, will be provided and sent to one or more Judicial Council specified address(es) via courier service or USPS, at no charge.

**5.0 TURNAROUND TIMES**

**5.1** For the scenarios described below, provide order completion turnaround times in **business days** for each type of service listed above in **section 3.1.** Be sure to note any circumstances, exceptions, conditions, etc. that may affect turnaround times.

* 1. Level 1 Report: Appraisal report with no/few challenges (e.g., a single parcel located in an area with recent comparable sales).
  2. Level 2 Report: A moderately complex appraisal report with some challenges (e.g., a “carve-out” parcel which is currently part of a larger parcel – but for which no legal description is currently available).
  3. Level 3 Report: A complex report with multiple challenges (e.g., a “carve-out” parcel which is currently part of a larger parcel – but for which no legal description is currently available, and which is located in an area with no recent comparable sales).

**RESPONSES MUST BE NUMBERED EXACTLY AS NUMBERED IN section 3.1 above.**

**6.0 SERVICE PROVIDER INFORMATION**

a. **General Overview of Service Provider.** Provide a general overview of your firm.

b. **List of any institutional or governmental agency clients**. Provide a list of any institutional or governmental agency clients with whom your firm has worked during the past twelve (12) months and the scope and type of services provided. Indicate if your firm has previous experience with the State of California Department of General Services Appraisal Review Unit and, if so, describe.

c. **Client References.**  Provide the names, addresses, and telephone numbers of three (3) client references for whom your firm has provided similar services (i.e. services as described in RFP **Section 3.0 - Scope** of **Services**) at some point in the last twelve (12) months. The Judicial Council may contact these references as part of the evaluation process.

d. **List of Counties where Service Provider has provided services.** Provide a list of counties in the State of California in which your firm has provided similar services (i.e. services as described in RFP **Section 3.0 - Scope of Services**) over the last twelve (12) months.   Indicate for each county whether the services were provided by your company directly, or through an agent or subcontractor.

e. **Service Provider’s Experience Appraising Special Purpose Properties.** Describe experience your firm has with respect to appraising special purpose properties within the past twenty four (24) months where there may be no relevant market, such as schools, churches, cemeteries, parks, utilities and similar properties as described in the Law Revision Commission Comment to Code of Civil Procedure Section 1263.320.

f. **Quality Assurance.** The Judicial Council expects the initial appraisal report submitted to the Judicial Council on the completion due date to be a complete, final, proofread, fact-checked report that meets all Judicial Council/DGS requirements, with only minor revisions, if any, needed after review by the Judicial Council. Please describe in detail your firm’s quality assurance process.

g**. Responsiveness.** Describe in detail the process your firm will use to insure prompt and complete responses to Judicial Council inquiries, questions, and requests for clarification, including those that arise after reports have been issued by your firm**.**

h**. Methodology** Please describe the methodology you will use to produce the various types of appraisal reports listed above in **section 2.1.**

i**. Additional Information.**  Provide any additional information you believe should be considered in the evaluation of your proposal limiting it to two (2) pages.

**7.0 ADMINISTRATIVE RULES**

Review RFP **Section 11.0, Administrative Rules Governing the RFP / Protest Process.**

**8.0 JUDICIAL COUNCIL’S FORM OF STANDARD AGREEMENT**

Review RFP **Attachment D, Judicial Council’s Form of Standard Agreement**. This agreement will be the basis for contracts that may be issued as a result of the RFP, between the Judicial Council and selected Service Providers. See RFP Section 6.0, Technical and Cost Proposal Contents, Article 6.2(a), Acceptance of Terms and Conditions.

**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 ninety (90) day period, the Judicial Council reserves the right to negotiate extensions to this period.

**Signature (must be completed by proposer):**

|  |  |  |  |
| --- | --- | --- | --- |
| Signed this \_\_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ , 20\_\_\_\_\_\_\_\_. | | | |
| By: |  |  |  |
|  | Signature |  | Title |
| Print Name: |  |  |  |

**END OF SUBMISSION FORM FOR TECHNICAL PROPOSAL**