



Attachment A

Proposal Content

Real Estate Relocation Assistance Consultant Services



ADMINISTRATIVE OFFICE
OF THE COURTS

OFFICE OF COURT CONSTRUCTION
AND MANAGEMENT

ATTACHMENT A

PROPOSAL CONTENT

The Prospective Relocation Assistance Consultant Service Provider (“Consultant”) shall include all of the following information in a written proposal to the Administrative Office of the Courts (“AOC”). The proposal should contain the information in the order set forth below. Proposals should provide straightforward, concise information addressing the requirements noted below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on providing materials that conform to the AOC’s instructions, and to completeness and clarity of content.

1. Staff, Background Information, Methodology

1. Name the staff members that Consultant proposes to provide services. Provide resumes describing the background and experience of the staff that you intend to utilize for the performance of the work, describing each individual’s ability and experience in conducting the proposed activities.
2. Names, addresses, and telephone numbers of five (5) references/clients for whom Consultant has provided similar services in the last 12 months. The AOC will speak with the references/clients listed by Consultant. By virtue of submission of Consultant’s proposal identifying said clients, Consultant thereby releases the AOC and said clients from any liability for any and all claims of harm caused to Consultant’s reputation by virtue of said discussions.
3. Provide a description of the methodology you propose to use in providing the following relocation consultant services (“Services”) requested in this RFP, along with a proposed schedule to complete such Services:
 - a. Pre-planning services for relocation projects, including but not limited to providing an estimate of total relocation costs (before any of the steps below have commenced)
 - b. Project management
 - c. Project initiation activities, including preparation and sending of required notices to all occupants
 - d. Community meetings and workshops
 - e. Meetings with State of California Department of General Services (“DGS”) and Department of Finance
 - f. Relocation plan preparation, including the drafting of a settlement agreement with each relocating occupant.
 - g. Relocation Assistance Implementation Services
 - h. Relocation Appeals Support
 - i. Interim Property Management
 - j. Records Administration and Claim Tracking.
4. Detail the activities and the related prospective timeframe for the activities Consultant would expect are necessary to produce a relocation package for submission to AOC, and the activities and duration you would expect to be

necessary to revise and provide a relocation package for submission by the AOC to DGS. Consultant is requested to provide the methodology they would use in calculating relocation assistance benefits for relocation of one business/governmental agency and one residential occupant of a 50,000 square foot mixed use building in an urban area. If there are various other types of methodologies that you as a Consultant feel will be provided to fulfill the AOC's needs as described in this RFP, and the methodology and duration will vary from the above, provide each separately. Indicate any interim approvals, direction, or information that you will require the AOC to supply in support of your methodology.

5. An alphabetical listing of all California cities in which the Consultant has provided Services to its clients during the last 36 months, including the name(s) of the clients serviced and numbers and types of Services provided.
 6. Website Access: Provide the AOC with the information needed to access to any website that you would intend to make available to the AOC as part of the Services you expect to provide. Provide any passwords or codes needed for temporary access. If a separate area must be established for AOC use, populate said area with the postings you would expect for the project requested in the methodology above.
2. Fees:
1. The proposal should include the Consultant's proposed fee schedule indicating cost of Services for one residential occupant and one business/governmental agency occupant, including but not limited to: full written report; limited scope; and other variations as proposed by Consultant for the various different types of Services to be provided. It is expected that all Consultants responding to this RFP will offer the Consultant's government rates or comparable favorable rates. Consultant's quoted rates will become a part of the contract.
 2. Be advised that if travel and living expenses are necessary to provide the Services, Consultant will be reimbursed subject to the limitations of the AOC's current Travel and Living Expense Policy, which can be found in the Exhibit B of the Sample Contract posted with this RFP. Consultants are advised to read the contract and understand this policy.