



Request for Proposals for Real  
Estate Appraisal Services  
OREFM-2013-06-CC

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ISSUED: JANUARY 6, 2014



ADMINISTRATIVE OFFICE  
OF THE COURTS

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JUDICIAL AND COURT ADMINISTRATIVE  
SERVICES DIVISION

OFFICE OF REAL ESTATE & FACILITIES MANAGEMENT



**Judicial Council of California**

ADMINISTRATIVE OFFICE OF THE COURTS

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REQUEST FOR PROPOSALS

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Date

January 6, 2014

To

Potential Service Providers

From

Administrative Office of the Courts  
(AOC), Office of Real Estate and  
Facilities Management

Subject

Request for Proposals for Real Estate  
Appraisal Services

Action Requested

You are invited to review and respond to  
the attached Request for Proposal (RFP)  
for Real Estate Appraisal Services  
OREFM-2013-06-CC

RFP Posted to:

<http://www.courts.ca.gov/rfps.htm>

Submittal Deadline

February 18, 2014 1:00 p.m. PST

Submittal of Proposals shall be made to:

Judicial Council of California  
Administrative Office of the Courts,  
Attention: Nadine McFadden, 455 Golden  
Gate Avenue, 6th Floor, San Francisco,  
CA 94102

For further information, please write to:

<mailto:capitalprogramsolicitations@jud.ca.gov>

<b>RFP SCHEDULE</b>		<b>DATES (PST)</b>
1.	RFP is Issued	<b>January 6, 2014</b>
2.	Deadline for submitting requests to the AOC for additional information, clarifications, or RFP modifications. E-mail all questions, using the Form for Questions ( <b>Attachment I</b> ) posted along with this RFP, to <a href="mailto:capitalprogramsolicitations@jud.ca.gov">capitalprogramsolicitations@jud.ca.gov</a>	<b>1:00 p.m. Friday, January 31, 2014</b>
3.	AOC will post answers to participants' requests for additional information, clarifications or RFP modifications, on the California Courts website, Bidders / Solicitations page, located at: <a href="http://www.courts.ca.gov/rfps.htm">http://www.courts.ca.gov/rfps.htm</a> (California Courts website)	<b>(estimated) Friday, February 7, 2014</b>
4.	<b><u>Deadline to submit Proposal</u></b> See RFP Section 5.10 for further details. Submit to: Judicial Council of California Administrative Office of the Courts, Attention: Nadine McFadden, 455 Golden Gate Avenue, 6th Floor, San Francisco, CA 94102	<b>1:00p.m. Tuesday February 18, 2014</b>
5.	AOC will determine a short list of qualified prospective Service Providers and post the list on the California Courts website: <a href="http://www.courts.ca.gov/rfps.htm">http://www.courts.ca.gov/rfps.htm</a> . If interviews are deemed necessary, short listed firms will be contacted to schedule a date and time for the interview.	<b>(estimated) Tuesday, March 4, 2014</b>
6.	If applicable, interviews of short listed firms will be completed (by phone or on-site, to be determined)	<b>Parties to coordinate</b>
7.	Notice of Intent to Award will be posted on the California Courts website: <a href="http://www.courts.ca.gov/rfps.htm">http://www.courts.ca.gov/rfps.htm</a>	<b>(estimated) Friday, March 21, 2014</b>
8.	Contract Executed	<b>(estimated) Friday, April 25, 2014</b>
9.	Contract Start Date	<b>Thursday, May 1, 2014</b>
10.	Contract End Date	<b>Sunday, April 30, 2017</b>

This RFP and all associated documents and addenda will be posted on the California Courts website, Bidders / Solicitations link, at: <http://www.courts.ca.gov/rfps.htm>

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## **1.0 GENERAL INFORMATION**

The Judicial Council of California (“Council”), chaired by the Chief Justice of California, is the chief policy-making entity of the California judicial system. The California Constitution directs the Council to improve the administration of justice by surveying judicial business, recommending improvements to the courts, and making recommendations annually to the Governor and the Legislature. The Council also adopts rules for court administration, practice, and procedure, and performs other functions prescribed by law. The Administrative Office of the Courts (“AOC”) is the staff agency for the Council and assists both the Council and its chair in performing their duties. The Office of Real Estate and Facilities Management (“OREFM”) a division of the AOC, is responsible for real estate and facility management for the Superior and Appellate Court facilities in California, including site acquisitions and property dispositions.

Senate Bill 1407 (Perata), which was signed into law in October, 2008, funds and finances up to \$5 billion in trial court facility construction throughout the state. Currently, there are site acquisitions in progress or planned, for which we will need new appraisals or updates to already obtained appraisals. Additionally, an undetermined number of appraisals will be required for existing facilities in support of planned dispositions. Appraisals also may be used to obtain policies of title insurance and to meet other business needs.

## **2.0 PURPOSE OF THIS RFP**

The AOC seeks to identify and retain one or more qualified appraisal firms (“Service Provider[s]”) to determine the fair market value of existing court facilities and prospective court facility sites in California. This RFP is the means for prospective Service Providers to submit their qualifications and pricing proposals to the AOC for consideration, along with detailed descriptions of the various types of appraisal reports offered, such as full reports for prospective land acquisitions or abbreviated replacement cost reports for valuation of existing court facilities. After evaluating proposals, the AOC may invite one or more qualified prospective Service Providers to enter into a standard agreement (“Standard Agreement” or “Contract”) with the AOC.

The initial contract term will be for three (3) years beginning on approximately May 1, 2014 and expiring on April 30, 2017.

## **3.0 GENERAL SCOPE OF SERVICES**

During the contract term, the Service Provider is expected to provide appraisal services, as more particularly described in **Attachment A-Scope of Services**, on an as-needed basis for an undetermined number of existing court facilities and prospective courthouse sites throughout the State of California. Appraisal services may be ordered at any time during the contract term or not at all. The subject properties are located in various counties throughout the State of California.

## **4.0 RIGHTS**

The AOC reserves the right to reject any and all proposals in whole or in part, as well as the right to issue similar RFPs in the future. This RFP is in no way an agreement, obligation, or contract and

neither the AOC nor the State of California is in any way responsible for the cost of preparing any of the proposals. One copy of each proposal will be retained by the AOC for official files and will become a public record.

## 5.0 RFP ADMINISTRATION

5.1. Prospective Service Providers are hereby advised that, by virtue of the act of providing a proposal to the AOC, they are agreeing to be subject to the AOC's **Administrative Rules Governing Requests for Proposals**, included in this RFP as **Attachment B**. Prospective Service Providers are advised to read and understand these rules before submitting a proposal.

5.2. The RFP process and RFP Schedule are subject to change at any time. Changes will be posted to the California Courts website <http://www.courts.ca.gov/rfps.htm>, and no other notifications of changes shall be transmitted. Prospective participants are urged to consult the California Courts website regularly to remain apprised of any and all changes. Staying abreast of changes in the RFP is the sole responsibility of the prospective Service Provider.

5.3. Throughout this solicitation process, if there is a need to communicate with the AOC regarding this RFP, such communication will be via e-mail to the RFP e-mail address: [capitalprogramsolicitations@jud.ca.gov](mailto:capitalprogramsolicitations@jud.ca.gov)

5.4. With regard to the nature of the work being requested as well as this RFP itself, prospective Service Providers and their sub-contractors must not contact any AOC personnel directly except as provided for in Section 5.3 above. Violation of this restriction may disqualify a firm from consideration.

5.5. Questions regarding the content of this RFP must be submitted no later than the date and time for submission of questions specified in the RFP Schedule. Please use the "Form for Questions" (**Attachment I**) as the vehicle for submitting your questions to the RFP e-mail address: [capitalprogramsolicitations@jud.ca.gov](mailto:capitalprogramsolicitations@jud.ca.gov)

5.6. The AOC will post answers to the questions submitted, as well as any necessary clarifications and addenda to this RFP, on the California Courts website <http://www.courts.ca.gov/rfps.htm> in accordance with the date specified in the RFP Schedule.

5.7. Following submission of proposals, no further questions regarding the RFP will be answered, with the exception of questions regarding the RFP process itself. Any questions regarding the RFP process should be directed in writing to the following RFP e-mail address: [capitalprogramsolicitations@jud.ca.gov](mailto:capitalprogramsolicitations@jud.ca.gov)

5.8. Proposals are due on or before the date and time specified in the RFP Schedule or as the RFP Schedule is subsequently modified via any changes posted to the California Courts website <http://www.courts.ca.gov/rfps.htm>. It is the sole responsibility of the submitting Service Provider to ensure that the proposal reaches the AOC on or before the date and time specified. Proposals received after the deadline will be rejected without review. With the

exception of proposals delivered by hand, the AOC provides no receipts nor makes any notification of its receipt or failure to receive any proposal.

5.9. All materials to be submitted may be sent by US mail, express mail, courier service of the prospective Service Provider's choice, or by hand delivery to the AOC. E-mail submissions will not be accepted.

5.10. Submissions must be sent or delivered to:

**Judicial Council of California  
Administrative Office of the Courts  
Attn: Ms. Nadine McFadden  
455 Golden Gate Avenue, 6th Floor  
San Francisco, CA 94102**

*(Indicate RFP Number and Name of Your Firm at lower left corner of envelope)*

*If a proposal is hand-delivered, it must be submitted to the AOC's **6th Floor reception desk** located at the above address. Prospective Service Providers are advised to obtain a handwritten receipt from the AOC receptionist when submitting. If receptionist is not available, please use 6th Floor Lobby Phone to contact Nadine McFadden, Ext. # 865-4962*

5.11. After submitted proposals have been reviewed for compliance with the requirements of this RFP, a list of qualified firms ("Short List") will be established if deemed necessary, and posted to the California Courts website <http://www.courts.ca.gov/rfps.htm>. See Section 7 for additional details.

5.12. If the AOC deems it necessary, firms on the Short List will be contacted to schedule interview times and locations. These are typically conducted by conference call, however, the AOC may, at its option, require on-site visits if necessary.

5.13. AOC will select firms from the Short List, post Notice to Award to the California Courts website <http://www.courts.ca.gov/rfps.htm>, then work with those firms to execute contract.

## **6.0 PROPOSAL SUBMISSION**

6.1. Submit your proposal into two (2) separate envelopes to the address specified above (see section 5.10) on or before the date and time required as noted in the RFP Schedule. Proposals received after the deadline will be rejected without review.

6.2. The Proposer should include the following attachments in the **technical proposed envelope**.

**Submit Five (5) written copies of your proposal with:**

Attachment D, Proposer's Acceptance of Terms and Conditions, Attachment E, Darfur Contracting Act Certification, Attachment F, Submission form for Technical Proposal and Attachment H, Conflict of Interest Certification Form.

**Submit one (1) CD or flash drive with:**

- (1) The text of your entire proposal (all information requested in **Attachment F**) posted as a single MS Word file on the disk or drive. Label the file with the name of your organization and the words "**Complete Proposal - OREFM-2013-06-CC**."

6.3 The Proposer should include the following in the **cost proposed envelope**.

- (1) **Attachment G Submission form for Cost Proposal**), as a single MS Word file, with the name of your organization and the words: "**Price Proposal Only - OREFM-2013-06-CC**."

6.4 Accompanying the above materials, submit one (1) written and signed Payee Data Record (**Attachment J**). On the Payee Data Record, indicate the exact legal name under which you propose to contract with the AOC. The Payee Data Record is **not** considered to be a part of your proposal, and should **not** be posted to the disk or flash drive you submit.

## **7.0 PROPOSAL EVALUATION PROCESS; DETERMINATION OF SHORT LIST**

7.1. Responsive proposals must contain all of the information required in RFP **Attachment F, Submission form for the Technical Proposal**.

7.2. An evaluation team consisting of OREFM staff will evaluate the proposals.

7.3. The evaluation team will initially determine if the proposal conforms to the requirements of this RFP. Prospective Service Providers who submit proposals failing to meet RFP requirements will not be ranked as set forth in section 7.4, or included on the Short List.

7.4. The evaluation team will evaluate and rank the proposals according to the assigned weights indicated below. In the process of ranking the proposals, OREFM staff may contact client references included in the proposals, in order to verify past experience and performance of the prospective Service Provider, their key personnel, and their key sub-contractors, as appropriate.



7.5. Qualifications to be evaluated and ranked:

WEIGHT	QUALIFICATIONS TO BE EVALUATED
30%	Reasonableness of <b><u>price proposal</u></b> including discounts from any published price lists that are offered.
20%	<b><u>Quality of the Methodology</u></b> described in your firm’s proposal; Ability to meet the <b><u>Report Requirements</u></b> as outlined in Attachment A “Scope of Services”.
15%	<b><u>Turnaround times</u></b> to complete orders for services.
12.5%	<b><u>Prior breadth of experience</u></b> , as evidenced by your firm’s proposal responses; <b><u>Credentials of staff</u></b> your firm proposes to assign to the AOC account as evidenced by your firm’s proposal, resumes submitted, and client references.
12.5%	<b><u>Quality assurance process</u></b> ; <b><u>Process for insuring responsiveness</u></b> to AOC questions; Ability to meet the <b><u>Contract Administration requirements</u></b> as outlined in Attachment A “Scope of Services”.
10%	Ability to provide <b><u>service coverage</u></b> in one or more of the counties within the State;  Ability to perform work using qualified <b><u>local appraisers</u></b> in the counties for which your firm has indicated it can provide appraisal services.

7.6. Following the interviews, if applicable, the evaluation team will re-evaluate proposal rankings, taking into consideration the results of interviews, and, using the assigned weights, will determine the highest ranking prospective Service Providers.

7.7. Successful service providers selected under this RFP will not be precluded from consideration nor given special status in any succeeding RFPs issued by the AOC for appraisal services.

**8.0 CONTRACT TERMS**

The AOC intends to contract with the Service Provider using a master agreement that establishes the overall scope of services to be provided, the obligations of the parties, and the prices and fees to be charged. Each assignment will be authorized under the master agreement in a signed work authorization. Each such work authorization will include details about the nature of the particular assignment or assignments the service provider will perform for the AOC, the timeline(s) for the assignment(s), reporting guidelines, and other information, as well as a not-to-exceed amount for the services authorized.

The standard agreement to be used is included as **Attachment C** to this RFP. The contract term will be for three (3) years beginning on approximately **May 1, 2014** and expiring on **April 30, 2017**. **The**

**term of this Agreement may be extended for (1) year renewal option at the sole option of the AOC.**

The AOC reserves the right to modify or update the standard agreement in whole or in part at any time prior to the signing of the agreement.

## **9.0 CONFIDENTIAL OR PROPRIETARY INFORMATION**

California judicial branch entities are subject to rule 10.500 of the California Rule of Court (see [www.courtinfo.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10\\_500](http://www.courtinfo.ca.gov/cms/rules/index.cfm?title=ten&linkid=rule10_500)), which governs public access to judicial administrative records.

If information submitted in a proposal contains material noted or marked as confidential and/or proprietary that, in the AOC's sole opinion, meets the disclosure exemption requirements of Rule 10.500, then that information will not be disclosed upon a request for access to such records. If the AOC finds or reasonably believes that the material so marked is **not** exempt from disclosure, the AOC will disclose the information regardless of the marking or notation seeking confidential treatment

## **10. DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION GOALS**

The AOC has waived the inclusion of DVBE participation in this solicitation

## **11. PROTEST**

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract Manual (see <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 AOC to receive a solicitation specifications protest is the due date and time for submittal of proposals.

Protests should be sent to: AOC – Business Services  
ATTN: Protest Hearing Officer  
455 Golden Gate Avenue, Seventh Floor  
San Francisco, CA 94102

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