

REQUEST FOR PROPOSALS

*SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO*

**REGARDING:**

RFP 24-01 VOLUNTARY BENEFIT PLANS

**PROPOSALS DUE:**

**August 13, 2024** NO LATER THAN **1:15 P.M.** PACIFIC STANDARD TIME

1. **BACKGROUND INFORMATION**

USI Insurance Services (“USI”) is conducting a marketing survey on behalf of the Superior Court of California, County of San Bernardino (“Court”). Qualified persons or entities (hereinafter referred to as “Bidder” or “Bidders”) are invited to submit a proposal for universal life with long term care and/or pet insurance with a January 1, 2025 effective date. Proposers are requested to submit rate guarantee(s) for five (5) years, one for the initial term, and 4 one-year options to renew. If you are unable to guarantee your rates for five (5) years, please provide a rate guarantee for three (3) years, one for the initial term, and 2 one-year options to renew. The option to extend the contract beyond the first year is exercisable at the sole discretion of the Court.

A copy of this solicitation will be posted on the following websites: [*https://caleprocure.ca.gov/pages/Events-BS3/event-search.aspx*](https://caleprocure.ca.gov/pages/Events-BS3/event-search.aspx)and [*http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx*](http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx).

1. **DESCRIPTION OF GOODS AND/OR SERVICES**
   1. Reference USI’S marketing letter dated July 15, 2024, and the following attachments:
      1. Voluntary Benefits Matrix
      2. Long Term care census
2. **TIMELINE FOR THIS RFP**

The Court has developed the following list of key events related to this RFP. All dates are subject to change at the discretion of the Court.

| **EVENT** | **DATE** |
| --- | --- |
| RFP issued**:** | July 30, 2024 |
| Deadline for questions | August 2, 2024  *1:15 PM Pacific Time* |
| Questions and answers posted *(estimated)* | August 6, 2024 |
| **Latest date and time proposal may be submitted** | **August 13, 2024**  ***1:15 PM Pacific Time*** |
| Best and Final Offer (BAFO) request date | August 14, 2024 |
| Best and Final Offer (BAFO) due date | August 16, 2024  *1:15 PM Pacific Time* |
| Evaluation of proposals (*estimate only*) | Week of August 26, 2024 |
| Anticipated interview dates, if required (*estimate only*) | August 28, 2024 |
| Notice of Intent to Award (*estimate only*) | September 9, 2024 |
| Negotiations and execution of contract (*estimate only*) | September 18, 2024 |
| Effective date of coverage and contract start date | January 1, 2025 |
| Contract end date (*if all options are exercised*) | December 31, 2030 |

1. **RFP ATTACHMENTS**

| **ATTACHMENT** | **DESCRIPTION** |
| --- | --- |
| Attachment 1 - Administrative Rules | These rules govern this solicitation. **Please read carefully.** |
| Attachment 2 - General Terms and Conditions/Defined Terms | If selected, the person or entity submitting a proposal must sign an agreement containing these terms and conditions. |
| Attachment 3 - Acceptance of Terms and Conditions | Form to indicate Bidder’s acceptance of the terms and conditions. |
| Attachment 4 - General Certifications Form | Form to indicate Bidder’s agreement on required general certifications. |
| Attachment 5 - Good Standing Form | Form to indicate Bidder’s good standing. |
| Attachment 6 - Darfur Contracting Act Certification | Form for Bidder to certify Darfur Contracting Act status. |
| Attachment 7 - Unruh Civil Rights Act and California Fair Employment and Housing Act Certification | Form for Bidder to certify Unruh Civil Rights Act and California Fair Employment and Housing Act compliance. |
| Attachment 8 - Iran Contracting Act Certification | Form for Bidder to certify Iran Contracting Act status. |
| Attachment 9 - Payment Provisions | This form contains information regarding contemplated payment terms and requirements to process invoices for payment. |
| Exhibit A - USI Voluntary Benefit Plans Marketing Letter | Information from USI for this RFP |
| Exhibit B - Voluntary Benefits RFP 24-01 Matrix | Spreadsheet to be completed by Bidder |

1. **PAYMENT INFORMATION**

See Attachment 9: Payment Provisions.

1. **PRE-PROPOSAL CONFERENCE**

A pre-bid conference is not scheduled for this solicitation. Questions are to be submitted per Attachment 1 Section 2 Questions Regarding the Solicitation.

1. **SUBMISSION OF PROPOSALS**
   1. Proposals should provide straightforward, concise information that satisfies the requirements of the “Proposal Contents” section below. Expensive bindings, color displays, and the like are not necessary or desired – **unbound is preferred**. Emphasis should be placed on conformity to the RFP’s instructions and requirements, and completeness and clarity of content.
   2. The Bidder must submit its proposal in two parts, the non-cost portion and the cost portion:
      1. The Bidder must submit **one (1) paper original** of the non-cost portion of the proposal. The original must be signed by an authorized representative of the Bidder. The original non-cost portion of the proposal must be submitted to USI in a single sealed envelope, separate from the cost portion. *The Bidder must write “non-cost” and the RFP title:* ***Voluntary Benefit Plans*** *and number #****24-01*** *on the outside of the sealed envelope.*
      2. The Bidder must submit **one (1) paper original** of the cost portion of the proposal. The original must be signed by an authorized representative of the Bidder. The original cost portion of the proposal must be submitted to the Court in a single sealed envelope, separate from the non-cost portion. *The Bidder must write “cost” and the RFP title:* ***Voluntary Benefit Plans*** *and number #****24-01*** *on the outside of the sealed envelope.*
         1. The Bidder must submit **an electronic version of the entire proposal** via email to scccsb.rfp@usi.com. The files contained in the email should be in PDF, Word, or Excel formats. *The Bidder must include the RFP title* ***Voluntary Benefit Plans*** *and number #****24-01*** *on the subject line of the email. Please submit this email* ***by 1:15pm PT*** *on August 2, 2024.*
   3. Proposals must be delivered by the date and time listed on the coversheet of this RFP to:

USI Insurance Services

Attn: SCCCSB RFP Team

21250 Hawthorne Blvd. Suite 380

Torrance, CA 90503

(424) 390-0000 (for delivery purposes only)

* 1. **Late bids will not be accepted.**
  2. Only written bids will be accepted. Bids should be sent by courier service (e.g. FedEx or UPS) or delivered by hand. *The RFP title and number must be stated on the outside of the delivery envelope or package.*

1. **PROPOSAL CONTENTS**

All information submitted in the proposal must be clearly legible.

* 1. Non-cost Portion. The following information must be included in the non-cost portion of the proposal. A proposal lacking any of the following information may be deemed non-responsive:
     1. Bidder’s legal name, address, and telephone number.
     2. Name, title, address (if different), telephone number, and email address of the individual who will act as the Bidder’s designated representative for the purposes of this RFP.
     3. For each key staff member: a resume describing the individual’s background and experience, as well as the individual’s ability and experience in conducting the proposed activities.
     4. Names, addresses, and telephone numbers of a minimum of three (3) clients for whom the Bidder has conducted similar services. The Court may check references listed by the Bidder.
     5. Attachments 3-8 and USI required spreadsheet.

Bidder must include the following properly completed attachments or exhibits:

* + - 1. Acceptance of Terms and Conditions
      2. General Certifications Form
      3. Good Standing Form
      4. Darfur Contracting Act Certification
      5. Unruh Civil Rights Act and California Fair Employment and Housing Act Certification. Bidder must complete this form and submit the completed form with its proposal only if its cost proposal exceeds $100,000.00, including the initial term and all options.
      6. Iran Contracting Act Certification. Bidder must complete this form and submit the completed form with its proposal only if its cost proposal exceeds $1,000,000.00, including the initial term and all options.
    1. USI Required spreadsheet:
       1. Exhibit B Voluntary Benefit Plans Matrix
  1. Cost Portion. The following information must be included in the cost portion of the proposal:
     1. Bidder must include monthly rates for all years included in the guarantee period.

1. **OFFER PERIOD**

A Bidder’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 Court reserves the right to negotiate extensions to this period.

1. **EVALUATION OF PROPOSALS**
   1. The Court will evaluate proposals as described in the Administrative Rules (Attachment 1) on a 100 point scale using the criteria set forth in the table below:

| **CRITERION** | **maximum number of points** |
| --- | --- |
| Plan Options | 30 Points |
| Prior Experience | 20 Points |
| Cost | 40 Points |
| Acceptance of the Court’s terms and conditions | 10 Points |

* 1. Award, if made, will be to the highest scored proposal. If a contract will be awarded, the Court will post a Notice of Intent to Award at <http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx>.

1. **INTERVIEWS**

The Court may conduct interviews with Bidders to clarify aspects set forth in their proposals or to assist in finalizing the ranking of top-ranked proposals. The interview process may require a demonstration. The interview may also require a demonstration of equivalence if a brand name is included in the specifications. The interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the Court’s offices. The Court will not reimburse Bidders for any costs incurred in traveling to or from the interview location. The Court will notify eligible Bidders regarding interview arrangements.

1. **CONFIDENTIAL OR PROPRIETARY INFORMATION**

**PROPOSALS ARE SUBJECT TO DISCLOSURE TO THIRD PARTIES AND**

**MEMBERS OF THE PUBLIC PURSUANT TO APPLICABLE LAWS, INCLUDING PUBLIC DISCLOSURE PURSUANT TO RULE 10.500 OF THE CALIFORNIA RULES OF COURT.** Except as required by law, The Court will not disclose (i) social security numbers, or (ii) balance sheets or income statements submitted by a Bidder that is not a publicly-traded corporation. All other information in proposals may be disclosed in response to applicable public records requests, or as otherwise required by law. Such disclosure may be made regardless of whether the proposal (or portions thereof) is marked “confidential,” “proprietary,” “copyright ©,” or otherwise, and regardless of any statement in the proposal (a) purporting to limit the Court’s right to disclose information in the proposal, or (b) requiring the Court to inform or obtain the consent of the Bidder 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. Submission of any proposal pursuant to this RFP constitutes acknowledgment and consent by the Bidder to the potential public disclosure of its proposal content, as set forth in this Section 12. **Bidders are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.**

1. **DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION GOALS**

Qualification for the DVBE incentive is not mandatory. Failure to qualify for the DVBE incentive will not render a proposal non-responsive.

Eligibility for and application of the DVBE incentive is governed by the Court’s DVBE Rules and Procedures. Bidder will receive a DVBE incentive if, in the Court’s sole determination, Bidder has met all applicable requirements. If Bidder receives the DVBE incentive, the dollar amount of its bid will be reduced (for evaluation purposes only) by an amount equal to 3% of the lowest responsible bid, not to exceed $100,000.00.

To receive the DVBE incentive, at least 3% of the contract goods and/or services must be provided by a DVBE performing a commercially useful function. Or, for solicitations of non-IT goods and IT goods and services, Bidder may have an approved Business Utilization Plan (“BUP”) on file with the California Department of General Services (“DGS”).

If Bidder wishes to seek the DVBE incentive:

1. Bidder must complete and submit with its bid Attachment 7A - Bidder Declaration). Bidder must submit with the Bidder Declaration all materials required in the Bidder Declaration.
2. Bidder must submit with its bid Attachment 7B - DVBE Declaration, completed and signed by each DVBE that will provide goods and/or services in connection with the contract. If Bidder is itself a DVBE, it must complete and sign the DVBE Declaration. If Bidder will use DVBE subcontractors, each DVBE subcontractor must complete and sign a DVBE Declaration. NOTE: The DVBE Declaration is not required if Bidder will qualify for the DVBE incentive using a BUP on file with DGS.

Failure to complete and submit these forms as required will result in Bidder not receiving the DVBE incentive. In addition, the Court may request additional written clarifying information. Failure to provide this information as requested will result in Bidder not receiving the DVBE incentive.

If this solicitation is for IT goods and services, the application of the DVBE incentive (including the maximum value of the DVBE incentive) may be affected by application of the small business preference. For additional information, see the Court’s Small Business Preference Procedures for the Procurement of Information Technology Goods and Services.

If Bidder receives the DVBE incentive: (i) Bidder will be required to complete a post-contract DVBE certification if DVBE subcontractors are used; (ii) Bidder must use any DVBE subcontractor(s) identified in its bid unless the Court approves in writing the substitution of another DVBE; and (iii) failure to meet the DVBE commitment set forth in its bid will constitute a breach of contract.

If using DVBE subcontractors, the Bidder must complete and return to the Court a copy of the post-contract certification form (https://www.courts.ca.gov/documents/JBCM-Post-Contract-Certification-Form.docx), promptly upon completion of the awarded contract, and by no later than the date of submission of Bidder’s final invoice to the Court. If the Bidder fails to do so, the Court will withhold $10,000 from the final payment, or withhold the full payment if it is less than $10,000 until the Bidder submits a complete and accurate post-contract certification form.

When a Bidder fails to comply with the post-contract certification requirement in this section and a payment withhold is applied to a contract, the Court shall allow the Bidder to cure the deficiency after written notice. Notwithstanding the foregoing and any other law, if after at least 15 calendar days, but no more than 30 calendar days, from the date of the written notice the Bidder refuses to comply with the certification requirements, the Court shall permanently deduct $10,000 from the final payment, or the full payment if less than $10,000.

FRAUDULENT MISREPRESENTATION IN CONNECTION WITH THE DVBE INCENTIVE IS A MISDEMEANOR AND IS PUNISHABLE BY IMPRISONMENT OR FINE, AND VIOLATORS ARE LIABLE FOR CIVIL PENALTIES. SEE MVC 999.9.

1. **PROTESTS**

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract Manual (see www.courts.ca.gov/documents/jbcl-manual.pdf). Failure of a Bidder 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 Court to receive a solicitation specifications protest is **two (2) days after Questions and Answers are posted**. Protests should be sent to:

Superior Court of California, County of San Bernardino

Attn: Susan Jones, Assistant General Counsel

247 West Third Street, 3rd Floor

San Bernardino, CA 92415-0214

Throughout the review process, the Court has no obligation to delay or otherwise postpone an award of contract based on a Bidder protest. In all cases, the Court reserves the right to make an award when it is determined to be in the best interest of the Court to do so.