

REQUEST FOR PROPOSALS

*SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO*

**REGARDING:**

RFP 21-03 DISABILITY INSURANCE PLANS

**PROPOSALS DUE:**

**AUGUST 19, 2020** NO LATER THAN **1:00 P.M.** PACIFIC 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 disability insurance plans with a January 1, 2021 effective date. Proposers are requested to submit rate guarantee(s) for three (3) years, one for the initial term, one for an option to renew in the second year, and same for the third year. The option to extend the contract in year 2 and 3 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 USIs cover letter dated August 5, 2020 and the following documents:
      1. *160283 LTD Certificate*
      2. *160283 STD Class 1 Certificate-Exempt*
      3. *160283 STD Class 2 Certificate-CSP&CPF*
      4. *STD W2 and FICA Svs Agreement*
      5. *Disability Rate History*
      6. *STD and LTD Claims Report*
2. **TIMELINE FOR THIS RFP (**All dates subject to change at the discretion of the Court)

| **EVENT** | **DATE** |
| --- | --- |
| RFP issued | August 5, 2020 |
| Deadline for questions | August 10, 2020  *3:00 PM Pacific Time* |
| Questions and answers posted | August 12, 2020 |
| **Latest date and time proposal may be submitted** | **August 19, 2020**  ***1:00 PM Pacific Time*** |
| Best and Final Offer (BAFO) request date | August 20, 2020 |
| Best and Final Offer (BAFO) due date | August 24, 2020 |
| Anticipated interview dates, if required (*estimate only*) | September 2 & 3, 2020  9:00 AM to 1:00 PM Pacific Time |
| Final evaluation of proposals (*estimate only*) | September 11, 2020 |
| Notice of Intent to Award (*estimate only*) | September 18, 2020 |
| Negotiations and execution of contract (*estimate only*) | October 16, 2002 |
| Effective date of coverage and contract start date | January 1, 2021 |
| Contract end date (*estimate only if all options exercised*) | December 31, 2023 |

1. **RFP ATTACHMENTS**

| **ATTACHMENT** | **DESCRIPTION** |
| --- | --- |
| Attachment 1 - Administrative Rules RFQs-IFBs-RFPs | These rules govern this solicitation. **Please read carefully.** |
| Attachment 2 - General Terms-Conditions-Benefits | If selected, the person or entity submitting a proposal must sign an agreement containing these terms and conditions. |
| Attachment 3 - Acceptance of Terms-Conditions-Benefits | 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 - Payment Provisions-Benefits | This form contains information regarding contemplated payment terms and requirements to process invoices for payment. |
| Exhibit A – USI Marketing Letter | Information from USI for this RFP. |
| Exhibit B – 160283 LTD Certificate | Current provider information. |
| Exhibit C – 160283 STD Class 1 Certificate-Exempt | Current provider information. |
| Exhibit D – 160283 STD Class 2 Certificate-CSP&CPF | Current provider information. |
| Exhibits E – STD W2 and FICA Svs Agreement | Current provider information. |
| Exhibit F – Disability Rate History | Current provider information. |
| Exhibit G – STD and LTD Claims Report | Current provider information. |
| Exhibit H – STD LTD Carrier Questionnaire | Spreadsheet to be completed by Bidder. |

1. **PAYMENT INFORMATION**

See Attachment 8: Payment Provisions-Benefits.

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. 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 the Court in a single sealed envelope, separate from the cost portion. *The Bidder must write “non-cost” and the RFP title and number 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 and number on the outside of the sealed envelope.*
         1. The Bidder must submit **an electronic version of the entire proposal** on USB Flash Drive with the cost portion. The files contained on the USB Flash Drive should be in PDF, Word, or Excel formats.
   3. Proposals must be delivered by the date and time listed on the coversheet of this RFP to:

Superior Court of California, County of San Bernardino

Attn: Purchasing, RFP #21-03 Disability

247 West Third Street, 11th Floor

San Bernardino, CA 92415-0066

* 1. **Late bids will not be accepted.** Bids should be sent by courier service (e.g. FedEx or UPS) or delivered by hand. Bids sent by USPS generally do not arrive at the Court on time because they are delivered to County Central Mail first, which adds 1-7 days to the delivery transit time. *The IFB title and number must be stated on the outside of the delivery envelope or package.*
  2. Only written bids will be accepted. Bids may not be transmitted by fax or email.

1. **PROPOSAL CONTENTS**

All information submitted in 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. 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.
     4. Court Attachments 3-7. Bidder must include the following properly completed attachments or exhibits:
        1. Acceptance of Terms-Conditions-Benefits
        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.
     5. Proposed plans.
     6. USI required spreadsheet: Exhibit H – STD LTD Carrier Questionnaire.
  2. Cost Portion. Proposed rates, including rate guarantee(s).

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.

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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** |
| --- | --- |
| Quality of Plans | 30 Points |
| Provider Network | 30 Points |
| Cost | 30 Points |
| Acceptance of 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 one or more 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 interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the Court’s offices in San Bernardino. The Court will not reimburse Bidders for any costs incurred in traveling to or from the interview location. USI Insurance Services will notify eligible Bidders regarding interview arrangements.

1. **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 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 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 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. Bidders are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

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1. **DISABLED VETERAN BUSINESS ENTERPRISE INCENTIVE**

The Court’s DVBE participation goal is a minimum of 3% of the value of all Court contracts in any given fiscal year (July 1 thru June 30). To implement the DVBE program the Court may grant Bidders that provide DVBE participation a DVBE incentive. The Court DVBE incentive for procurements awarded to the lowest responsible Bidder may be initially 3%. The Court DVBE incentive for procurements awarded to the highest scoring Bidder may also initially be 3%. Any Bidder claiming the DVBE incentive for any procurement must submit the appropriate certifications as part of a complete bid package. The Court will not apply the DVBE incentive without the proper certifications on file.

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: Steve Pascover, Advisory Attorney

247 West Third Street, 11th Floor

San Bernardino, CA 92415-0302

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.