

Cover Letter to the Amended RFPs

There has been some concern of the short turnaround time of both the Request for Proposal (RFP) for Financial Management Services and Asset Disposition Plan Services. We are amending the timeline as described below:

Interview and Award dates shown below are subject to change.

Release of RFP	May 31, 2012
Deadline for Submission of Questions	June 5 , 2012
Response to Questions Posted	June 6, 2012
Deadline for Proposals	Noon June 15, 2012
Tentative Dates for Interview of Highest Ranking Candidates	June 18 through 20, 2012
Tentative Date for Awarding Agreement	June 22, 2012

Some concerns have been voiced regarding the level of information the RFQ is requesting. We have provided some guidance as to the level of information your proposal needs to include. Below is an outline of proposal format and what is needed from the proposers.

1. **Cover Page – {Complete Attachment A}**
Attachment A is to be used as the cover page for the proposal. This form must be fully completed and signed by an authorized officer of the Proposer.
2. **Table of Contents – {Complete a Table of Contents}**
All pages of the proposal, including the enclosures, must be clearly and consecutively numbered and correspond to the Table of Contents.
3. **Statement of Experience – {Complete a 1 to 2 page summary of experience. For item C you can provide your company's standard marketing package}**
Include the following in this section of the proposal:
 - a. Business name of the prospective Proposer and legal entity such as corporation, partnership, etc.
 - b. Number of years the prospective Proposer has been in business under the present business name, as well as related prior business names.
 - c. A brief summary of the relevant qualifications and experience in providing the services solicited in this RFP.
4. **Minimum Proposer Requirements – {Complete Attachment A}**
Complete, initial, and sign Attachment B.
5. **Exceptions to RFP – {Complete Attachment C if applicable}**
Complete Attachment C.
6. **Statement of Certification – {Complete Attachment D}**
(Attachment D) - Include the following in this section of the Proposal
 - a. A statement that the offer made in the proposal is firm and binding for 180 days from the date the proposal is opened and recorded.

- b. A statement that all aspects of the proposal, including the fee proposal, have been determined independently, without consultation with any other prospective Proposer or competitor for the purpose of restricting competition.
 - c. A statement that all declarations in the proposal and attachments are true and that this shall constitute a warranty, the falsity of which will entitle the County to pursue any remedy by law.
 - d. A statement that the Proposer agrees that all aspects of the RFP and the proposal submitted shall be binding if the proposal is selected and an Agreement awarded.
 - e. A statement that the Proposer agrees to provide the County with any other information the County determines is necessary for an accurate determination of the Proposer's ability to perform the services as proposed; and
 - f. A statement that the prospective Proposer, if selected will comply with all applicable rules, laws and regulations.
7. **References – {Complete Attachment E}**
Provide three (3) references from other agencies that you have established an Agreement with on a project of this nature, of same or similar size. Provide Contact Name, Address, Phone Number, and dates services were provided on Attachment E.
8. **Proposal Description – {Complete a 1 to 2 page summary of proposers approach along with the constraints and assumptions}**
Provide a detailed description of the proposal being made.
- a. The proposal should address, but is not limited to, all terms in Section IV.
 - b. The proposal should include the following:
 - i. A brief synopsis of the Proposer's understanding of the County's needs and how the Proposer plans to meet these.
 - ii. A concise statement of the services (and product, if applicable) proposed.
 - iii. An explanation of any assumptions and/or constraints.
9. **Project Team Organization Chart – {Complete the proposer's organization chart and include key staff working on proposal.}**
Project Team Organization Chart shall clearly show the organization of the team and the hierarchy of the members. It must include:
- a. Organizational framework for the proposed Project team.
 - b. Company name and key staff name for each role identified in the chart.
10. **Work Plan and Schedule – {Complete a 1 to 2 page summary of proposers timeline of the approach}**
Include the following:
- a. Summary of management/work plan for this Project;
 - b. Project schedule
 - i. Develop an asset disposition and marketing plan
 - ii. Conduct comparables for individual properties.
 - iii. Valuations/Appraisals to establish property value.
11. **Statement of Qualifications – {Complete a 1 to 2 page summary of proposer's qualifications and qualification of key members working on the proposal.}**

Include the following in this section of the proposal:

- a. Number of years the prospective Proposer has been in business under the present business name, as well as related prior business names.
- b. Statement that the Proposer does not have any commitments or potential commitments which may impact the Proposer's ability to perform this Agreement.
- c. A list of references with which Proposer has provided similar services during the last five (5) years. Please include the name, address, and telephone number, and the type of services provided. Please include a contact person who the County can call in order to verify the quality of services your organization/firm has provided.
- d. Resumes of key Project team members.
- e. Provide project profiles that directly relate to this Project in terms of size and scope. The project profiles shall clearly indicate the scope of services Proposer provided for that project.

12. Not included

13. Cost – {Complete Attachment E}

Complete proposed pricing on Attachment F and enclose it in a separate sealed envelope to be submitted as part of the proposal.

14. Employment of Former County Officials – {Complete a page statement addressing the former County Officials}

Provide information on former County of San Bernardino administrative officials (as defined below) who are employed by or represent your business. The information provided must include a list of former county administrative officials who terminated county employment within the last five years and who are now officers, principals, partners, associates or members of the business and should also include the employment and/or representative capacity and the dates these individuals began employment with or representation of your business. For purposes of this section, "county administrative official" is defined as a member of the Board of Supervisors or such officer's staff, Chief Executive Officer or member of such officer's staff, county department or group head, assistant department or group head, or any employee in the Exempt Group, Management Unit or Safety Management Unit.

Failure to provide this information may result in the response to the request for proposal being deemed non-responsive.

15. Insurance – {Complete a page statement addressing the Indemnification and Insurance Requirements }

Submit evidence of ability to insure as stated in Section V, Paragraph B, Indemnification and Insurance Requirements.