

STATE OF NEW YORK

JUDICIARY

—REQUEST FOR BID/PROPOSAL—

(This is not an order)
**BID MUST BE MADE ON THIS SHEET
 OR AS OTHERWISE SPECIFIED**

**New York State Judicial Institute
 84 North Broadway
 White Plains, New York 10603**

Direct Inquiries to: **Trisha Conway**
 Telephone No.: **(914) 824 - 5803**
 Email: **TCONWAY@courts.state.ny.us**

Price to include delivery to (describe exact location and method of delivery)

Per attached RFB/RFP Specifications

Bid Number: RFB# OCA/JI-134	Commodity Group: CONFERENCE SERVICES
Issue Date: 12/03/2007	
Opening Date: 12/27/2007	Commodity Name: MATRIMONIAL LAW SEMINAR
Time: 3:00 PM	

OFFICE OF GENERAL SERVICES "GENERAL SPECIFICATIONS" ARE FULLY INCORPORATED HEREIN.

Agency's Specification of item(s) Required (include quantities)	Bidder's Quotation and Specific Description of Item Offered
<p><u>UCS ATTACHMENTS I, III AND IV ATTACHED & INCORPORATED HEREIN.</u></p>	<p>Respondents are to submit all required documentation and pricing in the format prescribed by the attached RFB/RFP Specifications.</p>

NOTICE TO BIDDERS

Pursuant to the Rules and Regulations of the Chief Administrator for the Courts, sealed responses for furnishing the item(s) in this Solicitation will be received at the above address. When submitting a response, you must:

1. Complete this form in its entirety using ink or typewriter and return with all other documents.
2. Explain any deviations or qualifications if your response deviates from the specifications. If necessary, attach a separate sheet setting forth such explanations.

3. Sign the Solicitation Forms. The Bid/Proposal response must be completed in the name of the respondent (corporate or other) and must be fully and properly executed by an authorized person.

4. INDICATE THE SOLICITATION NUMBER, THE OPENING DATE AND TIME ON THE ENVELOPE CONTAINING THE SEALED RESPONSE.

5. Mail the bid/proposal response to the above agency address in sufficient time for it to be received before the specified bid opening. **LATE RESPONSES WILL BE REJECTED.**

BIDDER HEREBY CERTIFIES THAT THE ABOVE QUOTED (OR OTHERWISE NOTED) PRICES ARE APPLICABLE TO ALL CUSTOMERS FOR COMPARABLE QUANTITIES, QUALITY, STYLES OR SERVICES.

RESPONSES MUST BE SIGNED

Bidder's Firm Name		Employer's Federal Identification Number	
Address Street	City	State	Zip
Bidder's Signature		Official Title	
Printed or Typed Copy of Signature		Area Code/ Telephone Number Email Address	

DOCUMENT ENCLOSURE CHECKLIST

___ Pricing sheet - the pricing sheet must be included in bidder's proposal. Failure to do so will immediately disqualify bidder's response.

The following documents must be fully executed and included in bidder's proposal. Failure to do so may disqualify bidder's response:

- ___ UCS Request for Bid Form with original signature
- ___ Attachment I, p.3 - Non-Collusive Bidding Certificate
- ___ Attachment I, p.4 - Corporate Acknowledgment
- ___ Attachment III - Vendor Responsibility Questionnaire
 - paper questionnaire
 - questionnaire file online via OSC VendRep System
- ___ Attachment IV - Procurement Lobbying Forms
 - Disclosure of Prior Non-Responsibility Determination (UCS 420)
 - Affirmation of Understanding and Agreement (UCS 421)
 - Termination Clause (UCS 423)
- ___ List of at least three (3) references (names, contacts, addresses, phone numbers, emails)
- ___ Menus and price lists
- ___ Original bid response + five (5) complete copies
- ___ Signed Documents Enclosure Checklist

To be complete, a bidder's bid response must include ALL the above documents. All documents requiring an original signature must bear the BLUE INK signature of the same authorized individual. Signatory notarization must be that of the person whose signature is affixed to all required documents.

Company Name: _____
Authorized Officer's Name and Title:

Signature: _____ Date: _____

Table of Contents

GENERAL SPECIFICATIONS

- A. The RFB/RFP Process
 - Note to Bidders
 - Online RFB/RFP Package: Disclaimer
 - Questions
 - Bid Response: Original and Copies
 - Binding Duration of Bid/Proposal on Bidders
 - Packaging, Identifying and Delivering Bid/Proposal
 - No-Bid
 - Rejected and Unacceptable Bids/Proposals
 - Qualifications

- B. RFB# OCA/JI-134
 - Purpose and Scope
 - Quality of Facility
 - Site Visits
 - Right of Cancellation
 - Purchase Order
 - Rates and Charges
 - Menus and Price Lists
 - Method of Award
 - Payments
 - Independent Contractor Status
 - Compliance with Laws
 - Security
 - Termination Pursuant to Procurement Lobbying Act

DETAILED SPECIFICATIONS

- Location
- Lodging
- Catering
- Meeting Space
- Program Coordination
- Pre-Event Conference
- Parking
- Photocopy
- Storage
- Audiovisual
- Miscellaneous Needs

BID SHEET

*** GENERAL SPECIFICATIONS ***

I. The RFB/RFP Process

Note to Bidders

1. Attachment I - Standard Request for Bid Clauses & Forms and Attachment IV- Procurement Lobbying Law required forms

In addition to such other specifications and criteria as are presented herein, the NYS Unified Court System Attachment I - Standard Request for Bid Clauses & Forms, and Attachment IV - Disclosure of Prior Non-Responsibility Determination (UCS 420) as well as Affirmation of Understanding and Agreement (UCS 421) and Termination Clause (UCS 423) pursuant to the Procurement Lobbying Act, which must be downloaded or printed from the UCS Contract & Procurement website under "Addenda" for the appropriate solicitation, are incorporated and made a part of this solicitation.

2. Attachment III - Vendor Responsibility Questionnaire

The NYS Unified Court System (UCS) is required to conduct a review of a prospective contractor to provide reasonable assurances that the vendor is responsible. The required Vendor Responsibility Questionnaire is designed to provide information to assist UCS in assessing a vendor's responsibility prior to entering into a contract with the vendor. Vendor responsibility is determined by a review of each prospective contractor's legal authority to do business in New York State, business integrity, financial and organizational resources, and performance history (including references).

Bidders are invited to file the required Vendor Responsibility Questionnaire online via the New York State VendRep System or may choose to complete and submit a paper questionnaire. To enroll and use the New York State VendRep System, see the VendRep System Instructions available at www.osc.state.ny.us/vendrep or go directly to the VendRep System online at <https://portal.osc.state.ny.us>. For direct VendRep System user assistance, the OSC Help Desk may be reached at 866-370-4672 or 518-408-4672 or by email at helpdesk@osc.state.ny.us. Vendors opting to file a paper questionnaire can obtain the appropriate questionnaire from the VendRep website www.osc.state.ny.us/vendrep or may contact the Unified Court System or the Office of the State Comptroller for a copy of the paper form. Bidders who file the Vendor Responsibility Questionnaire online via the OSC VendRep System are requested to checkmark the appropriate box on the Document Enclosure Checklist. Bidders' authorized signature of the RRB/RFP Form will serve as confirmation that bidders have knowingly filed their questionnaire online.

Online RFB/RFP Package: Disclaimer:

Bidders accessing any UCS/OCA solicitations and related documents from the NYS UCS website www.nycourts.gov/admin/bids under "Current Solicitations" shall remain solely and wholly responsible for reviewing the respective solicitation & bid documents on the internet regularly, up to the scheduled date and time of the bid/proposal due date, to ensure their knowledge of any amendments, addenda, modifications or other information affecting the solicitation or bid documents in question.

Questions:

Questions may be addressed **in writing only**, by email or by fax, to:

Trisha Conway
Management Analyst
NYS Judicial Institute
84 North Broadway
White Plains, NY 10603

Email: Tconway@courts.state.ny.us Fax: 914-997-8982

No questions will be accepted after 5:00 pm, on December 14th, 2007. **Important:** All questions regarding this solicitation must be directed solely to the attention of the above-designated person. Contact by any prospective bidder, or any representative thereof, with any other personnel of the UCS/OCA other than the two designated persons named in this solicitation, Trisha Conway and Floyd Stewart, in connection with this RFB/RFP may violate the Procurement Lobbying Act of 2005 (see Attachment IV) and will jeopardize the respective bidder's standing and may cause rejection of its proposal.

Bid Response/Proposal: Original and Copies:

Bidders shall submit all the following required **original RFB/RFP documents:** Bid/Proposal; Executed RFB/RFP Form; Attachment I - pages 3 and 4 of 10; Attachment III - Vendor Responsibility Questionnaire (checkmark the appropriate box for paper questionnaire or online submission in Documents Enclosure Checklist); Attachment IV - Disclosure of Prior Non-Responsibility Determinations (UCS 420) Affirmation of Understanding and Agreement (UCS 421) and Termination Clause (UCS 423); and any other required documentation, brochures, samples, etc. listed on the Document Enclosure Checklist.

Failure to provide all original documents or the failure to provide the requested number of copies may result in disqualification of a bidder's response.

Binding Duration of Bid/Proposal on Bidders:

All bids/proposals shall remain binding on bidders until such time as OCA provides written notification of its intent to issue a purchase order to a specific bidder or until the bidder withdraws its bid/proposal in writing, whichever occurs first.

Packaging, Identifying and Delivering of Bids/Proposals:

Bidders may **not** submit their bid/proposal responses online.

All bid/proposal submissions must be securely contained in a sealed package or carton and **clearly labeled** in large block letters on two sides as follows:

"Deliver immediately to Floyd Stewart, R-840" and
"Sealed bid - Do not open" and
"OCA/JI-134 due 12/27/07 at 3:00 p.m."

Bids/Proposals must be **clearly addressed and submitted to:**

Floyd Stewart
Senior Court Analyst
NYS Office of Court Administration
25 Beaver street, R-840
New York, NY 10004

Failure to seal and mark the bid/proposal as prescribed may result in non-delivery and/or rejection of the bid/proposal. Please note that the bid/proposal must be received by the above-named OCA designated person by December 27th, 2007 at 3:00 pm at the latest, or the bid will be declared a "late bid" and will be disqualified. It is recommended that bidders allow several extra days for shipping in order to meet the deadline.

No-Bid:

Bidders are requested to send a no-bid letter to OCA, attn: Floyd Stewart, at the above address, should they decide not to answer this solicitation. The envelope shall be clearly marked in the lower left corner as follows: OCA/JI-134.

Rejected and Unacceptable Proposals:

The OCA and the JI reserve the right to reject any and all proposals or bids submitted in response to this solicitation. In addition, OCA and the JI may reject any bids/proposals from any bidders who are in arrears to the State of New York upon any debt or contract; or who have previously defaulted on any contractual obligations, (as surety or otherwise), or on any obligation to the State of New York; or who have been declared not responsible or disqualified by any agency of the State of New York; or who have any proceeding pending against them relating to the responsibility or qualification of the bidders to receive public contracts.

Qualifications:

Bidder's response must document its conformance to the quality standards set forth in Section II below and its ongoing current experience in providing the full range of services contained in this RFB's specifications or bidder's response may be rejected.

II. RFP # OCA/JI-134

Purpose and Scope:

The New York State Unified Court System (hereafter "UCS") Office of Court Administration (hereafter "OCA"), on behalf of the New York State Judicial Institute (hereafter "JI") is soliciting sealed bids to establish a single purchase order for conference services in the White Plains / Tarrytown, NY, area to provide lodging, catering, meeting space, and miscellaneous services for a three-day matrimonial law seminar for judges, attorneys and other court personnel to be held March 26, 27 and 28, 2008.

Quality of facility:

The facility's location, design, furnishings, features, organization of space, cleanliness and professionalism of staff must be of the quality appropriate for professionals at the top corporate executive level.

Site Visits:

The UCS/JI will conduct a site visit as part of its evaluation of bid responses to verify that bidders' hotels/facilities meet all the requirements stated in the general and detailed specifications.

The UCS/JI will also conduct one or more site visits to the awarded vendor between the award of the purchase order and the beginning of the program to ensure that the quality of services and the physical condition of the hotel/facility shall be the same or better at the time of performance as at the date of award.

Right of Cancellation:

The UCS/JI reserves the right not to hold the program at the awarded vendor's hotel/facility if UCS/JI determines that the quality of facility has deteriorated between the award of the purchase order and the beginning of the program.

Purchase Order:

A purchase order will be issued to the awarded contractor by UCS and it shall be subject to the approval of the Office of the State Comptroller (OSC).

Rates and Charges:

Bidders shall quote their prices on a per unit basis, i.e. per room, per breakfast, lunch, etc. Rates shall not exceed state rates for the geographic area. All rates quoted must include the service charge(s) if any. Bidders must specify which services are subject to service charge(s) and indicate the applicable percentage(s). All rates and charges must not include sales tax as the UCS/JI is tax exempt. Bidders must include all charges for each required service and note any services that will be offered on a complimentary basis. Any charges not included in the bid response will not be compensable.

Menus and Price Lists:

Bidders must attach to the Bid Sheet their official menus and price lists reflecting exactly the same prices as those quoted on the bid sheet. Discrepancies in prices between the different documents may disqualify bidder's response.

Method of Award:

The judicial matrimonial law seminar conference services will be awarded to the lowest dollar cost, responsible bidder. Lowest dollar cost shall be defined as the lowest "Total Cost of Seminar" quoted by bidders on the Bid Sheet. In case of the bidder's miscalculation, unit price will prevail. Classification of a bidder as a "responsible" bidder shall be determined by the bidder's compliance with these specifications, past performance history, and any other criteria necessary and reasonable to establish the bidder's responsibility.

Payments:

The awarded vendor must provide a master bill for all charges. Payment will be made by direct bill with payment due thirty (30) business days, not including legal holidays, from receipt of invoice. No payment or deposit of any kind will be made in advance of the event. UCS will not consider any bid responses that require advance payment or a deposit. In the event of late payment by UCS, vendor shall be entitled to interest as specified in Article XI-A of the State Finance Law.

Independent contractor status:

It is expressly understood and agreed that the awarded contractor's status shall be that of an independent provider of services and that no officer, employee, servant or subcontractor of the contractor is an employee of the UCS, OCA, JI or the State of New York. The awarded contractor shall be solely responsible for the work, assignment, compensation, benefits and personal conduct and standards of all such persons assigned to the provision of services. Nothing herein shall be construed to impose any liability or duty on the UCS, OCA, JI or the State of New York to persons, firms, consultants or corporations employed or engaged by the awarded contractor either directly or indirectly in any capacity whatsoever, nor shall the UCS, OCA, JI or State of New York be liable for any acts, omissions, liabilities, obligations or taxes of any nature including, but not limited to, unemployment and workers' compensation insurance of the awarded contractor or any of its employees or subcontractors.

Compliance with Laws:

The awarded contractor must be compliant with all applicable federal, state and local laws, rules and regulations, including the fire, health and safety codes. The awarded vendor must be in full compliance with all public accommodations requirements of the American with Disabilities Act (ADA), as necessary to provide goods and services to individuals. This compliance requirement extends to the period prior to and during the provision of all services under the purchase order resulting from this solicitation.

Security:

The awarded vendor shall provide access to UCS Security Personnel before and during the program.

Termination Pursuant to Procurement Lobbying Act

UCS shall have the right to terminate the agreement between the awarded vendor and UCS upon thirty (30) days prior written notice in the event that it is found that Bidder's/Vendor's certification regarding Bidder's/Vendor's disclosure of prior determinations of non-responsibility, as required by the Procurement Lobbying Act (State Finance Law §139-k), was intentionally false or intentionally incomplete.

****** DETAILED SPECIFICATIONS ******

Location:

The hotel/conference facility must be located in the White Plains /Tarrytown, NY, area, centrally located to all major highways, and be easily accessible by air, car, taxi or public transportation.

Lodging:

Bidder shall provide one hundred and fifty (150) single occupancy rooms the evening of March 26, 2008 and two hundred and fifty (250) single occupancy rooms the evening of March 27, 2008 for faculty, staff, and attendees. Bidder shall hold the guest room block exclusively for the matrimonial law seminar.

Catering:

Bidder shall provide an A.M. coffee break consisting of coffee, tea, decaf, fruit, bread/cake products, etc. and a P.M. coffee break consisting of coffee, tea, decaf, soda, fruit, cookies/brownies, snacks, etc, continental breakfasts, hot and cold buffet group luncheons, with kosher and vegetarian provisions if requested, for approximately three hundred and fifty (350) people on each of two days, one group dinner for approximately one hundred and fifty (150) attendees, and one group dinner for approximately two hundred and fifty (250) attendees. Bidder shall provide boxed lunches to go for approximately two hundred and fifty (250) people on the 3rd day. Bidder shall dedicate space exclusively for the use of matrimonial seminar participants for all meals.

Meeting Space:

The meeting space must be available on all three days, with exclusive access to the UCS judges and personnel. Bidder must provide a large meeting room with sufficient space to comfortably hold three hundred (300) to three hundred and fifty (350) people for a general session set classroom style. An additional breakout room shall hold ninety (90) to one hundred (100) people classroom style. There shall be a public space outside the general session for a registration set up of three (3) to four (4) six foot (6 ft.) tables and chairs. All function space must be set classroom/schoolroom style with enough space for a panel of six (6) to ten (10) presenters and audiovisual setups. Walls between meeting rooms must be sound-proof. Bidder shall provide separate space for lunch service and seating. Internet access must be available at registration and in all meeting rooms as well as guest rooms.

Program Coordination:

Bidder shall designate one professional from the Convention Services Department to handle and oversee all aspects of the program. Bidder shall provide radio contact with the convention services department professional or designee at all times during the program. Bidder shall provide a banquet order to confirm arrangements two weeks in advance of the Seminar.

Pre-Event Conference:

A pre-event conference will be held and must include the heads of all appropriate departments that would be involved in the program.

Parking:

Bidder shall provide parking for all attendees, faculty, and staff.

Photocopying:

Bidder shall provide large volume photocopying services on an emergency as needed basis. Bidder shall quote its photocopying rate on a per copy basis.

Storage:

Bidder shall provide UCS/JI with the exclusive use of space for storing and sorting of seminar materials and audiovisual equipment, for one full day in advance of the program and for the duration of the program.

Audiovisual:

The UCS/JI will provide its own audio visual equipment and services through a UCS/JI contractor.

Miscellaneous Needs:

The awarded vendor shall, upon request, provide a telephone installation in the registration area with outside service, as well as photocopy and fax (both incoming and outgoing) capabilities.

Bid Sheet

All rates to be quoted on a per unit basis and to include any service charge. Percentage service charge to be indicated in the appropriate column. Rates are not to exceed state rates for the geographic area. UCS is tax exempt. If there is no charge for any specified items, bidder shall indicate so in the appropriate area.

	% service charge	Rate per pers.	X	Total # people	=	Cost \$
Lodging (Per night) (single/double occupancy)	_____	\$ _____	X	400	=	\$ _____
AM Coffee Break	_____	\$ _____	X	700	=	\$ _____
PM Coffee Break	_____	\$ _____	x	700	=	\$ _____
Continental Breakfast	_____	\$ _____	x	700	=	\$ _____
Hot and Cold Buffet Lunch	_____	\$ _____	x	700	=	\$ _____
Boxed Lunch	_____	\$ _____	x	250	=	\$ _____
Group Dinner	_____					
Large		\$ _____	x	250	=	\$ _____
Small		\$ _____	x	150	=	\$ _____
Meeting Space/ Room Rental	_____	Rate/day	x	Days	=	Cost
General Session - 1 room		\$ _____	x	3	=	\$ _____
Breakout Room - 1 room		\$ _____	x	3	=	\$ _____
Lunch Area		\$ _____	x	2	=	\$ _____
Dining Area		\$ _____	x	2	=	\$ _____
Parking	_____	\$ _____	x	3	=	\$ _____
Pre-Event Conference	_____	\$ _____	x	1	=	\$ _____

Bid Sheet

Miscellaneous

	% service	charge	Rate/day	x	Days	=	Cost
Storage		_____	\$ _____	x	4	=	\$ _____
			Rate/phone/ day	x	Days	=	Cost
Telephone (one)		_____	\$ _____	x	3	=	\$ _____
			Rate/copy	x	Est. Volume (copies)	=	Cost
Photocopying		_____	\$ _____	x	1000	=	\$ _____
			Rate/fax	x	Est. Volume (faxes)	=	Cost
Faxes (incoming/outgoing)		_____	\$ _____	x	10	=	\$ _____

Other

(Identify any charges not listed above including any service charges)

Total Cost of Seminar \$ _____

Hotel/Conference Facility Name:

Authorized Officer's Name and Title:

Signature: _____ Date: _____