

Strategic Planning Consulting Services RFP Q&A

Good Standing in State of California:

1. The contracting requirements state that the vendor must be qualified to do business and in good standing in California. Is California registration/qualification required at the time of proposal submission, or may the selected vendor complete any necessary registration prior to contract execution?

Answer: State Bar requires vendors to be in good standing in California, we may continue the process if the registration is completed prior to contract execution. Please make sure you submit with your proposal the official registration confirmation that demonstrates the process to register is in progress.

2. Must an out-of-state bidder be registered, qualified to do business, and in good standing in California at the time of proposal submission, or may the selected bidder complete the applicable California qualification requirements prior to contract execution?

Answer: See answer to question 1.

3. Are any California business registration requirements applicable to an out-of-state LLC required at proposal submission, or only before contract execution?

Answer: See answer to question 1.

Budget:

4. Has the State Bar established a budget range or maximum investment for this engagement, including travel and other expenses?

Answer: The State Bar has budgeted up to \$100,000 for this engagement, however, as indicated in the RFP the cost will be 30% of the vendor's score.

5. Has the State Bar established an anticipated budget, funding range, or not-to-exceed amount for this engagement?

Answer: See answer to question 4.

6. Has the State Bar established a budget or not-to-exceed amount for this engagement? If so, can it be shared with bidders?

Answer: See answer to question 4.

7. Is there an anticipated budget or budget range for this engagement?

Answer: See answer to question 4.

8. Does the State Bar have an estimated or maximum budget allocated for this engagement?

Answer: See answer to question 4.

9. Has the State Bar established an anticipated budget or not-to-exceed amount for this engagement?

Answer: See answer to question 4.

10. Section II does not state a budget or not-to-exceed amount for the strategic planning scope. What budget has the State Bar allocated for this engagement?

Answer: See answer to question 4.

11. For proposal planning and pricing purposes, approximately how many Board members, senior leaders, internal stakeholders, and external stakeholders should bidders anticipate participating in surveys, individual interviews, focus groups, and other stakeholder-engagement activities?

Answer: The Board of Trustees is made up of 13 members; State Bar senior leaders include 7-15 individuals.

There may be outreach to additional external stakeholders as directed by the State Bar, which may include the legislature, the California Supreme Court, general public, licensees, local and specialty bar associations, legal services providers, law schools, and consumer advocacy organizations.

12. For pricing purposes, how many days should bidders assume for the multi-day Board strategic planning session, and should bidders assume the session will be conducted in person? If in person, what location should bidders assume?

Answer: Bidders should assume the multi-day planning session to take place over an initial two-day session and possibly additional one-day sessions. These sessions may be conducted in person, in a hybrid format, or virtually, subject to mutual agreement and Board preferences.

Attachment B, Itemized Cost Proposal:

13. Please confirm where bidders may obtain Attachment B, Itemized Cost Proposal, or whether the State Bar intends to provide the required native spreadsheet template separately.

Answer: We are not providing a template, please submit your own itemized cost proposal titled as Attachment B in (.xls) format detailing fees by task and personnel and any anticipated reimbursable expenses. Travel expenses, if applicable, will be reimbursed in accordance with the State Bar's [Travel and Business-Related Expense Policy](#).

14. The RFP references “Attachment B. Itemized Cost Proposal (.xls)” as a required submission document; however, Attachment B does not appear to be included in the RFP package provided to bidders. Could you please provide Attachment B or advise where bidders can access/download the Itemized Cost Proposal form?

Answer: See answer to question 13.

15. Section III.A, item 7 and Section III.B require Attachment (Itemized Cost Proposal) in native .xls format, but Attachment B was not included in the posted solicitation materials. Please post Attachment B or advise how bidders can obtain it.

Answer: See answer to question 13.

Public Notices:

16. Will State Bar staff manage public notices and collection of comments, with the consultant responsible for synthesis and revisions? How many review rounds should pricing include?

Answer: Because the draft Strategic Plan will be discussed during public meetings, it is possible that there will be public comment made regarding the Plan. The State Bar will manage the public notice requirements and direct the vendor, where appropriate, to incorporate relevant public comment into revised drafts of the Plan.

17. The RFP notes that the draft Strategic Plan will be publicly circulated for review and input. What role should bidders assume the consultant will play in supporting the public review process, including collecting, analyzing, synthesizing, and/or responding to public comments?

Answer: See answer to question 16.

18. Section II.A states the draft Strategic Plan will be publicly circulated for review and input. Is the consultant expected to manage the collection and synthesis of public comments and incorporate a revision cycle after public comment, and if so, is that included in the timeline in Section II.C?

Answer: See answer to question 16.

Bagley-Keene:

19. Will State Bar counsel review the proposed facilitation process and provide guidance on Bagley-Keene compliance, interview confidentiality and public disclosure requirements?

Answer: Yes

20. Must the proposed lead facilitator demonstrate prior direct experience facilitating meetings subject to the Bagley-Keene Open Meeting Act, or will demonstrated knowledge of the Act and a proposed facilitation approach that complies with its requirements satisfy this qualification?

Answer: Demonstrated knowledge of the Act and a proposed facilitation approach that complies with Bagley-Keene may satisfy this requirement.

21. What level of prior experience with the Bagley-Keene Open Meeting Act is expected? Will State Bar counsel provide guidance on meeting requirements during session planning?

Answer: Knowledge of the Bagley-Keene Open Meeting Act is preferred (see answer to question 20). The State Bar counsel will provide guidance on compliance requirements.

22. Will State Bar legal counsel advise on and review the engagement and facilitation design for Bagley-Keene compliance, including the confidential Board survey, individual interviews, synthesis of findings, and planning-session activities?

Answer: Yes, The State Bar counsel will provide guidance on compliance requirements.

Insurance:

23. Will the \$5 million umbrella and \$2 million cyber liability requirements apply fully to this engagement and research subcontractors, or may bidders propose coverage adjustments appropriate to the work.

Answer: The insurance terms apply fully to this engagement and to subcontractors of the vendor. As permitted by Section III.A.14, a potential vendor may submit proposed exceptions, modifications, or additions to these terms.

24. Please confirm whether compliance with the insurance limits identified in the RFP is required at proposal submission or only following award and prior to commencement of services. In addition, will the State Bar consider reasonable exceptions or alternative coverage structures regarding the \$5 million umbrella liability requirement?

Answer: Certificates of insurance must be provided to the State Bar prior to the commencement of work under a contract awarded pursuant to this RFP, but are not required for proposal submission. As permitted by Section III.A.14, a potential vendor may submit proposed exceptions, modifications, or additions to the insurance terms.

25. Do the insurance requirements in Section IV.F, including the \$2,000,000 professional liability, \$2,000,000 privacy and cyber, and \$5,000,000 umbrella limits, apply individually to each sub-vendor? Or may independent consultants working as sub-vendors be covered under the prime vendor's policies?

Answer: The insurance terms apply fully to subcontractors of the vendor. Each must carry insurance sufficient to meet the insurance terms. As permitted by Section III.A.14, a potential vendor may submit proposed exceptions, modifications, or additions to the insurance terms.

Small Business:

26. For a non-small-business prime utilizing one or more qualifying California-certified small-business subcontractors for at least 25% of the net bid price, please clarify how

the 5% bid preference will be applied and what documentation should be included with the proposal to establish eligibility.

Answer: If the vendor is a certified small business, they will receive a five percent (5%) bid preference, capped at \$50,000, if the lowest cost responsive bid is received from a vendor that is not a certified small business. Proof of small business certification if vendor is certified as a small business by the California Department of General Services (DGS), or with a comparable small business certification from a California municipality is required.

27. Is California Small Business certification mandatory for this solicitation, or is it only used as a 5% preference for eligible certified vendors?

Answer: A California Small Business certification is not mandatory. The preference is used for eligible certified vendors if applicable.

28. Section III.D provides a five percent bid preference for vendors certified as a small business by the California Department of General Services (DGS), or with a comparable small business certification from a California municipality. Which certifications does the State Bar accept as comparable, and will it accept a small business or disadvantaged business certification issued by another California public agency?

Answer: Proof of small business certification if vendor is certified as a small business by the California Department of General Services (DGS), or with a comparable small business certification from a California municipality is required.

OTHER:

29. Would virtual interviews and coordination meetings, with onsite work consolidated around the June Board planning session, meet expectations? Have the session's dates, location and duration been established?

Answer: Yes, virtual interviews and coordination meetings are acceptable.

Bidders should assume the multi-day planning session to take place over two days with possible additional one-day sessions. The dates and times of the planning session have not yet been established and are subject to availability of Board of Trustee members. The session may be conducted in person, in a hybrid format, or virtually, subject to mutual agreement and Board preferences.

30. Beyond Trustee interviews and the Board survey, how many interviews or focus groups should bidders anticipate? Is a broader public or licensee survey expected?

Answer: Bidders should expect to conduct interviews and/or focus groups with the Executive Director, senior leadership, and other identified stakeholders as agreed upon with the State Bar. This may include interviews/engagement with Legislators, legislative staff, and representatives of the California Supreme Court.

At this time, a public/licensee survey is not anticipated.

31. Beyond the Board of Trustees, does the State Bar have an anticipated number or range of stakeholder interviews, focus groups, or other engagement activities that bidders should assume for purposes of developing the cost proposal?

Answer: See answer to question 30

- Specifically, will the engagement with the California Supreme Court and Legislature be conducted by the consultant or coordinated by State Bar staff.

Answer: The engagement with representatives from the California Legislature and the California Supreme Court may be conducted by the consultant, the State Bar can assist in coordinating the engagement. The engagement with the Court and the Legislature, will be limited to select individuals (i.e. staff to the Judiciary Committees).

32. May the proposed lead facilitator be an employee or principal of an approved subcontractor, provided that the prime contractor retains overall contractual responsibility, project management, and accountability for the engagement?

Answer: No.

33. The RFP refers to Attachment A (Vendor History Questionnaire), Attachment B (Itemized Cost Proposal), and the State Bar Vendor AI FactSheet. These were not included in the copy of the RFP we received. Could you please send them or direct us to where they can be downloaded?

Answer: We are not providing a template for Itemized Cost Proposal, please submit your own itemized cost proposal titled as Attachment B in (.xls) format detailing fees by task and personnel and any anticipated reimbursable expenses. Travel expenses, if applicable, will be reimbursed in accordance with the State Bar's [Travel and Business-Related Expense Policy](#).

Attachment A (Vendor History Questionnaire) and State Bar Vendor AI Factsheet can be found in our business opportunities page.

<https://www.calbar.ca.gov/about-us/business-opportunities>

34. Could you provide the current solicitation and all required attachments, including the itemized cost proposal template?

Answer: We are not providing a template for Itemized Cost Proposal, please submit your own itemized cost proposal titled as Attachment B in (.xls) format detailing fees by task and personnel and any anticipated reimbursable expenses. Travel expenses, if applicable, will be reimbursed in accordance with the State Bar's [Travel and Business-Related Expense Policy](#).

Attachment A (Vendor History Questionnaire) and State Bar Vendor AI Factsheet can be found in our business opportunities page.

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35. Does the scope include professional graphic design, publication layout, accessibility remediation, and production of the final public-facing Strategic Plan, or should bidders assume that the consultant will provide the substantive content in a format or template supplied by the State Bar?

Answer: Yes, the scope should include professional graphic design and publication layout. The State Bar can work with the vendor to provide accessibility remediation.

36. If a bidder uses generative AI solely for internal administrative, analytical, or drafting support; does not submit confidential or State Bar data to the AI system; and subjects all AI-assisted outputs to human review and approval, would such use be permissible subject to disclosure and completion of the Vendor AI Factsheet?

Answer: Yes, such use would be permissible except for providing drafting support as described in this question.

37. Scope item II.B.2.d calls for outreach to additional external stakeholders "as directed by the State Bar." For pricing purposes, what volume should bidders assume, for example the approximate number of listening sessions, interviews, and surveys?

Answer: For pricing purposes, the bidder can assume there would be no more than 5 listening sessions. Individual interviews and surveys are not contemplated.

38. Does the State Bar expect the multi-day strategic planning session to be held in person? If so, how many days are anticipated, and would it take place in San Francisco or Los Angeles?

Answer: See answer to question 12.

39. If the strategic planning session is conducted in person, where will the session(s) be held?

Answer: In either San Francisco or Los Angeles.

40. Which activities, if any, must be conducted in person, and at which locations?

Answer: Activities may be conducted virtually, in a hybrid format, or in-person.

41. Would strategic planning and governing-board engagement experience within public higher education satisfy the relevant experience requirements, assuming comparable scope and complexity?

Answer: Yes

42. Would organization-wide strategic-planning engagements led as the accountable executive or process owner--rather than as an external consultant--be considered comparable engagements if the proposal documents scope, stakeholder participation, deliverables and results?

Answer: Yes

43. Does the State Bar expect the planning process to reassess the five current public-protection goals, or should bidders assume those goals will remain the organizing framework for the new plan?

Answer: Bidders should expect the process to reassess the five current public protection goals.

44. Beyond logistics and access to documents, what staff support will be available for stakeholder outreach, survey administration, research, and production of the final public-facing document? The responsibilities section does not specify that division of work.

Answer: Staff will provide support with setting meetings and posting relevant documents. The selected vendor will be responsible for producing the final, public-facing document.

45. What level of detail does the State Bar expect in the high-level implementation framework for the 2027-2032 plan? For example, should bidders anticipate developing implementation actions, owners, timelines, performance measures, or other accountability mechanisms for each strategic goal?

Answer: Bidders can look to the [2022-2027 Strategic Plan](#) for the level of detail expected.

46. The RFP requests at least three similar strategic planning engagements completed within the past five years. May bidders include relevant engagements completed by the proposed lead consultant prior to establishing or joining the bidding firm, provided the consultant's individual role and experience are clearly identified?

Answer: Yes

47. The RFP requests at least three strategic planning engagements completed within the past five years that are similar in scope. May a bidder satisfy this requirement through the relevant experience of its proposed lead consultant and/or subcontractor team members, or must all three engagements have been performed under contract by the prime bidder?

Answer: Yes

48. Submission Requirements 15 and 16 request information regarding disaster recovery, RTO/RPO, system recovery, security controls, encryption, audit logging, vulnerability management, and related measures. For a professional-services consulting firm that will not provide or host a technology platform or system for the State Bar, can you clarify how these requirements should be addressed and which provisions are applicable?

Answer: Based on the requirements of this engagement, the cybersecurity questions and requirements may not apply, and you can disregard them as not applicable.

49. Section III.A, items 15 and 16 request disaster recovery and security and compliance information. Do these items apply to consulting engagements in which the vendor does not host State Bar systems or data, and if so, how will the responses be evaluated?

Answer: See answer to question 48

50. Section III.A, item 9 asks for the most recent annual reports or a comparable document, including detailed profit and loss, assets and liabilities. Will the financial

summary completed in Attachment A satisfy this requirement, or are separate financial statements also required?

Answer: Yes, the completed financial summary in Attachment A will satisfy this requirement.