

TEAM LEGAL, INC.

LEGAL SUPPORT SERVICES

25876 THE OLD ROAD, SUITE 314
VALENCIA, CA 91381
(661) 964-0154 Fax: (661) 255-7484
www.teamlegalinc.com

ADDITIONAL OFFICES: LOS ANGELES, SAN DIEGO, SAN FRANCISCO, CAMARILLO/VENTURA, SACRAMENTO AND LANCASTER

August 15, 2021

Sander Huang
CITY OF CARSON
Purchasing Department
701 E Carson Street
Carson, CA 90745

In Re: City of Carson RFP 21-032 – Process Server / Messenger Services

Sander Huang,

Thank you for the opportunity to present this proposal and pricing on behalf of Team Legal, Inc., regarding the Process Server Services for the City of Carson.

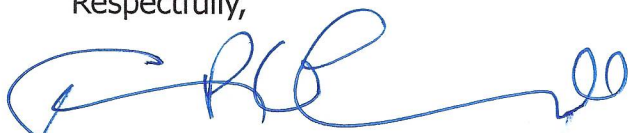
I hope that our experience, staffing, qualifications and competitive pricing will put us in the running for this prestigious contract.

I am the Director of Marketing & Client Relations for Team Legal, Inc. and I am authorized to negotiate for and bind and enter into contracts for Team Legal, Inc. I also will be the main point of contact for all correspondence and other contacts during the selection process.

I have reviewed the RFP and Scope of Work and Team Legal, Inc. can meet and exceed all requirements of this IFB. Team Legal, Inc. is a CA corporation in good standing with the California Secretary of State. Team Legal, Inc. will NOT be utilizing subcontractors if awarded this contract. Team Legal, Inc. has no changes or exceptions to the standard City of Commerce contract of service agreement.

If you have any questions or require any clarification with any of the areas of our proposal or pricing, please do not hesitate to contact me anytime via my direct cell phone of 661-312-6058 or by email at sean@teamlegalinc.com.

Respectfully,



Sean P. O'Connell
Director of Marketing & Client Relations
TEAM LEGAL, INC.

CITY OF CARSON
RFP 21-032
PROCESS SERVER / MESSENGER SERVICES

Executive Summary & Staff Qualifications

Team Legal, Inc., under its previous name We Win, began operations in 2004. (We were incorporated as Team Legal, Inc. on August 1, 2006.) The vision/mission was to create a full-service litigation support company built on the foundations of providing a superior work product, exceptional customer service and forward-thinking use of state-of-the-art technology to not only benefit day to day operations but for client ease and satisfaction in the most cost-effective manner possible. We have broken sales records each year and are strategically positioned to exceed that goal this year.

Our business focus has and will continue to be to provide quality legal support services, in a cost-effective manner with exceptional customer service to our legal, insurance and public entity clientele. We currently coordinate all our Statewide DCSS contracts out of our main corporate headquarters in Valencia and we have branch offices strategically located throughout the State of California to quickly and efficiently handle any work from the City of Carson.

Vincent Batza is the President and Chief Operations Officer of Team Legal. He is a licensed attorney and member of the California Bar and oversees all day-to-day operations and large-scale projects at Team Legal. Although he will not be in direct supervisory control of this contract, he will be the ever-present executive monitoring of the contract.

Sean P. O'Connell, the former General Manager and current Director of Marketing & Client Relations of Team Legal, Inc. will lead the City of Carson support team and be the dedicated main point of contact for this RFP. Sean has over 34 years of experience in the legal support industry. See complete bio/CV for Sean attached to this section.

Jennifer Sheehan, the current Branch Manager of Team Legal, Inc. will monitor the day-to-day operations of the City of Carson contract. Ms. Sheehan has proven herself at every level of the Team Legal, Inc. employment ladder, beginning as an assistant in our government contracts unit and rapidly ascending to her current position of Branch Manager in a very short time. She oversees the day-to-day operations of our two main operational offices in Valencia and Lancaster, CA. Jennifer has a plethora of experience with Service of Process and Medical Record/Document Scanning services. Jennifer is well versed in California Civil Procedure and trains all new employees. She will be the direct operational supervisor of the City of Carson Service of Process contract.

Current Contracts List - 2021

Team Legal, Inc. has already been awarded contracts or has contracts pending with the State of California and other local government contracts for the following agencies/departments:

- County of Riverside, Department of Children's Support Services. Statewide Legal Process Services. (Contract/Agreement No. DCARC-96147-002)
- County of Riverside, Department of Children's Social Services. Legal Process Services for child support division throughout Southern California. (Contract/Agreement No. DCARC-0000045680)
- County of Contra Costa, Department of Child Support Services Statewide/Nationwide Legal Process Services. (Contract/Agreement: 1780-2310)
- County of Yuba, Department of Child Support Services Statewide/Nationwide Legal Process Services. (Contract/Agreement: YDCSS-TL-2019-2021)
- County of San Joaquin, Department of Child Support Services Statewide/Nationwide Legal Process Services. (Contract/Agreement: CON0002270)
- County of Merced, Department of Child Support Services Statewide/Nationwide Legal Process Services. (Contract/Agreement: 2019181)
- County of Solano, Department of Child Support Services. Statewide/Nationwide Legal Process Services. (Contract/Agreement: 2019-3163167)
- County of San Diego, Department of Child Support Services. Statewide/Nationwide Legal Process Services. (Contract/Agreement: 559099)
- County of Orange, Department of Child Support Services. Statewide/Nationwide Legal Process Services. (Contract/Agreement: MA-027-18011714)
- County of Stanislaus, Department of Child Support Services. Statewide/Nationwide Legal Process Services. (Contract/Agreement: BOS – 18 - 0071)
- County of Ventura, Department of Child Support Services. Statewide Legal Process Services. (Contract/Agreement: 7697 - CT CSS 2250FY18)
- County of Santa Clara, Department of Child Support Services. Statewide Legal Process Services. (Contract/Agreement No. 2016-0001013)

- County of Placer, Department of Child Support Services. Statewide Legal Process Services. (Contract/Agreement No. BP023010)
- County of Butte, Department of Child Support Services. Statewide Legal Process Services. (Contract/Agreement No. BDCSS01443)
- County of San Bernardino, Risk Management Department. Statewide scanning and copying of medical records. (Contract/Agreement No. RMD – 15- 001)
- Los Angeles County Counsel. Service of process and medical record subpoena services. (Contract/Agreement number 2012-0000101)
- Los Angeles County Employee Retirement Association. Medical Records and TPA file on site document scanning services. (Contract/Agreement No. LACERA-942013)
- Department of Industrial Relations, Division of Occupational Safety and Health – Legal Unit for Document Scanning; Service of Process; and Court Filing Services for the RIVERSIDE and Oakland offices. (Contract/Agreement No. 41240015)
- City of San Jose Police Department. Countywide & Statewide Service of Process (Subpoenas). (Contract/Agreement No. OP 53303)
- Department of Corrections & Rehabilitation – Office of Legal Affairs for Statewide Legal/Medical Record Retrieval and Duplication Services (Agreement No. C5606347)
- Department of Transportation for trial preparation and presentation services for their four legal offices in San Francisco, RIVERSIDE, Sacramento and San Diego; (Agreements No. 42B0495; 42B0485 & 42B0484)
- Regal Medical Group – Medical Record retrieval, scanning and processing for multiple annual Medicare and Medicaid Audits throughout Southern California since 2007.
- Department of Consumer Affairs, Division of Investigation and Medical Board of California. Statewide Records on site scanning and copying. (Contract/Agreement No. REQ0014312)
- R. Rex Parris Law Firm. Statewide and Nationwide Service of Process services; Medical Record retrieval services; litigation support services and trial support services since 2006.
- Department of Public Health, Statewide Service of Process. (Contract/Agreement No. 21-10093)
- Department of Consumer Affairs, California Board of Accountancy. Statewide Legal Service of Process. (Contract/Agreement No. REQ0014616)

TEAM LEGAL, INC. Pricing Proposal -2021

A. SUMMARY

Annually, the city receives a comprehensive list from the State of California Franchise Tax Board of city residents and businesses that may have not paid city business tax. Due to the voluminous list of defendants, a large amount of cases will need to be served in a short amount of time. Therefore, this will require the bidder to list at least four (4) process servers available to handle cases.

The city of Carson will provide a batch of cases to the awarded contracted company, to be served along with a service log. The service log must be returned with a court stamped copy of service, in order for the city to process payment for the contracted company. The contracted company will be required to make a minimum three (3) attempts to serve each defendant(s). If three attempts are made to serve paperwork, same location/same person, it should be noted on the service log that serving the defendant was unsuccessful. The city is liable for payment, to the contracted company, for the unsuccessful service. The contracted company must submit services to the appropriate courthouse within mandated deadlines. Most cases will be filed at Compton Courthouse.

Bidders must provide a pricing sheet(s) detailing available services:

Cost of serving one defendant in the following counties:

- Los Angeles: \$ 48.50
- Orange: \$ 48.50
- Riverside: \$ 48.50
- San Bernardino: \$ 52.50 (Non Rural)**
- San Diego: \$ 52.50 (Non Rural)**

Cost of serving two defendants at the same address in the following counties:

- Los Angeles: \$ 25.00 for second defendant. Base rate above for first defendant.
- Orange: \$ 25.00 for second defendant. Base rate above for first defendant
- Riverside: \$ 25.00 for second defendant. Base rate above for first defendant
- San Bernardino: \$ 25.00 for second defendant. Base rate above for first defendant
- San Diego: \$ 25.00 for second defendant. Base rate above for first defendant

Please provide a bid for the following:

Amount of single defendants served annually:	480	(\$48.50 x 480 = \$23,280.00)
Amount of two or more defendants served at a single location annually:	120	(\$73.50 x 120 = \$ 8,820.00)(48.50+\$25 = \$73.50)
Total amount of defendants served annually:	600	
Estimated amount of defendants served in Los Angeles County	480	
Estimated amount of defendants served outside Los Angeles County	120	

All copies of service to be stamped at Compton Courthouse [200 West Compton Blvd., Compton, CA 90220] and delivered to Carson City Hall [701 E Carson Street, Carson, CA 90745].

TOTAL AMOUNT OF CONTRACT PRICE FOR THE YEAR: \$ 32,100.00

**Rural/Remote Fees

San Diego County and San Bernardino County will have a base service fee of \$52.50 for non rural locations. Rural/remote area service fees, if applicable, will not be charged without authorization. Fees will apply to select rural/remote service locations and will be in addition to the base fee. The remote area/rural fees WILL NOT be charged without prior written consent/authorization from the requesting City of Carson staff member. Rural fees range from \$20 up to \$90 depending on the remote location.

CLIENT REFERENCE LIST

In order to more fully evaluate your background and experience for the project herein proposed, it is requested that you submit a list of references and/or similar projects completed or in progress within the last 24 months or as noted in the requirements of the RFP or IFB. Your cooperation in this matter is greatly appreciated.

Company Name: TEAM LEGAL, INC.

Number of years as a contractor in the work of this type: 16 years

Three projects/clients references for this type of work:

Client Name San Diego DCSS

Address 3666 Kearny Villa Road, San Diego, CA 92111

Contact Name Kendrik Eaton

Contact Email kendrik.eaton@sdcounty.ca.gov

Contact Phone Number 858-650-6578

Project Description Perform all service of process for the Department of Child Support Services Statewide and Nationwide

Project Start Date Sept 2018

Project End Date Sept 2022

Project Amount: \$360,000 annually

Client Name Orange County DCSS

Address 1055 N. Main Street, Santa Ana, CA 92701

Contact Name Ana Garcia

Contact Email agarcia@css.ocgov.com

Contact Phone Number 714-347-4988

Project Description Perform all service of process for the Department of Child Support Services Statewide and Nationwide.

Project Start Date July 2016

Project End Date July 2024

Project Amount: \$250,000 annually

Client Name State of California - DIR - DOSH

Address 1515 Clay Street, Suite 1901, Oakland, CA 94612

Contact Name Mary Ann David

Contact Email madavid@dir.ca.gov

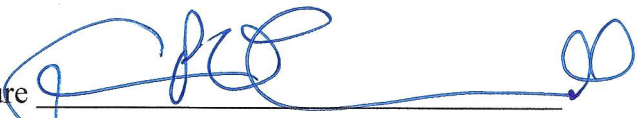
Contact Phone Number 510-286-7348

Project Description Perform all service of process; court services; and special projects for CA Dept of Industrial Relations, Division of Occupational Safety and Health Statewide for their LA and Oakland regional offices

Project Start Date January 2013

Project End Date January 2022

Project Amount: \$65,000 annually

Bidder's Signature 
Sean O'Connell, Director of Marketing & Client Relations

NOTE: If requested by the City, the bidder shall furnish a certified financial statement, references, and other information sufficiently comprehensive to permit an appraisal of his current financial condition.

**CITY OF CARSON
AFFIDAVIT OF NON-COLLUSION AND NON-DISCRIMINATION**

I hereby swear (or affirm) under the penalty of perjury:

That the attached proposal or bid has been arrived at by the responder independently and has been submitted without collusion with and without any agreement, understanding, or planned common course of action with any other firm or entity designed to limit fair and open competition;

That the contents of the proposal or bid response have not been communicated by the responder or its employees or agents to any person not an employee or agent of the responder and will not be communicated to any such persons prior to the official opening of the solicitation responses; and

The proposer/bidder does not and shall not discriminate, will provide equal employment practices, and will adhere to an affirmative action program to ensure that in their employment practices, persons are employed and employees are treated equally and without regard to or because of race, religion, ancestry, national origin, sex, sexual orientation, age, disability, marital status or medical condition.

I certify that the statements in this affidavit are true and accurate.



Signature

Sean O'Connell

Printed Name

August 15, 2021

Date

Director of Marketing & Client Relations

Title

**FEDERAL LOBBYIST
REQUIREMENTS CERTIFICATION**

Name of Firm: TEAM LEGAL, INC. Date: August 15, 2021

Address: 25876 The Old Road, Suite 314, Valencia

State: CA Zip Code: 91381 Phone No.: 661-964-0154

Acting on behalf of the above-named firm, as its Authorized Official, I certify as follows:

1. No Federal appropriated funds have been paid, by or on behalf of the above named firm to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of and Federal grant, loan or cooperative agreement, and any extension, continuation, renewal, amendment, or modification thereof, and;

2. If any funds other than Federal appropriated funds have paid or will be paid to any person for influencing or attempting to influence an officer or employee or any agency, a Member of Congress an officer or employee of Congress or an employee of a Member of Congress in connection with this Federal contract, grant loan, or cooperative agreement, the above named firm shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions, and:

3. The above-named firm shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreement) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into the transaction imposed by Section 1352 Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Authorized Official:

Name: Sean O'Connell Title: Director of Marketing & Client Relations

Signature:  Date: August 15, 2021

DEBARMENT AND SUSPENSION CERTIFICATION

Name of Firm: TEAM LEGAL, INC.

Acting on behalf of the above-named firm ("Consultant"), as its Authorized Official, I, the undersigned, certify as follows:

I am a duly authorized representative of ("Consultant"). Consultant certifies, to the best of its knowledge and belief, that Consultant, including its principals:

Is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency, and not does not have a proposed debarment pending;

Has not within the three-year period preceding this certification been convicted of or had a civil judgment rendered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction, contract, or subcontract under a public transaction; for violation of federal or state antitrust statutes; or for commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;

Is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (2) above; and

Has not within the three-year period preceding this certification had one or more public transactions (federal, state or local) terminated for cause or default.

Consultant further certifies that Consultant, including its principals, is not listed on the government-wide exclusions in the System for Award Management.

Consultant acknowledges that falsely providing this certification may result in criminal prosecution or administrative sanctions, and that this certification is a required component of all proposals in response to this RFP/IFB.

A proposal that does not include a completed and signed version of this certification will be deemed incomplete and materially nonresponsive, and will not be considered.

CONSULTANT

By: 

Title: Sean O'Connell, Director of Marketing

Date: August 15, 2021

