

CDT OSTP Request For Proposal



Department of Cannabis Control

CALIFORNIA

Request for Proposal (RFP)

RFP 2026-001

PART 1 – BIDDER INSTRUCTIONS

FOR

DCC - Cannabis Integration System CSI

June 19, 2026

Issued by:

STATE OF CALIFORNIA

Department of Cannabis Control 2920 Kilgore Road, Rancho Cordova, CA 95670

Part 1 of the solicitation template contains the bidder and bidding instructions, proposal form instructions, solution requirements and instructions, and all other instructional/compliance information that the bidder must meet in order to be considered responsive and responsible to the solicitation.

Part 2 of the solicitation template contains all forms a bidder must complete and return with its Final Proposal, including the SOW, administrative forms, qualification forms, requirement responses, and all

exhibits/attachments discussed in Part 1.

Disclaimer: The original version and any subsequent solicitation addenda released by the Procurement Official of this solicitation remain the official version. In the event of any inconsistency between the bidder's versions, articles, attachments, specifications or provisions (which constitute the Contract), the official State version of the solicitation in its entirety shall take precedence.

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RFP

PART 1 – BIDDER INSTRUCTIONS

1. INTRODUCTION

On behalf of the Department of Cannabis Control, this solicitation is being conducted under the authority of California Department of Technology (CDT) pursuant to Public Contract Code (PCC) §6611 which provides the authority to use a competitive negotiation process when the State's business need or the purpose of a procurement or contract is known, but negotiation is necessary to ensure that the State is receiving the best value or the most cost-efficient goods, services, information technology, and telecommunications.

This solicitation contains the instructions governing the requirements for fixed price deliverable-based proposals to be submitted by Bidders. Also included in this solicitation is the required format and materials Bidders must follow when responding to this solicitation. This solicitation also addresses the requirements that Bidders must meet to be eligible for consideration, as well as Bidders' responsibilities before and after award.

The following terms are used interchangeably throughout the solicitation documents: (1) "Contract" and "Agreement"; (2) "response" and "proposals". For additional definitions, see [ATTACHMENT 24: GLOSSARY OF TERMS](#).

1.1. PURPOSE

The purpose of this Request For Proposal (hereafter referred to as "solicitation") is to obtain proposals from qualified bidders to provide Department of Cannabis Control and the State of California (hereafter referred to as "State") with Cannabis System Integration (Hereafter referred to as "CSI").

The Contract Award, if made, will be to the single bidder in accordance with the methodology defined in [SECTION 6. EVALUATION](#).

1.2. BACKGROUND

The Department of Cannabis Control (DCC) leverages two separate instances of the Accela platform to manage essential business processes related to cannabis licensure, compliance, and enforcement. The two systems, known as the Cannabis Licensing, Enforcement, and Reporting (CLEaR) system and the Cultivation Licensing System (CLS), address distinct aspects of cannabis regulation in California.

The CLEaR system focuses on the licensure and regulatory oversight of cannabis retailers, distributors, laboratories, transporters, microbusinesses, event organizers and manufactured cannabis. Business processes include processing applications, tracking licensee activities, and ensuring compliance with state laws. The CLEaR system contains functionality to support Compliance and Enforcement activities as applicable to the licensing process within the system.

The CLS is specifically tailored to support the licensure and oversight of cannabis cultivation activities. This includes processes related to cannabis growers, raw product processing facilities, and nursery operators throughout California. Like CLEaR, the CLS incorporates tools for monitoring compliance and conducting enforcement activities, ensuring that cultivators adhere to state regulations and maintain high standards for safety, sustainability, and legal operations.

While these systems offer configurability, maintaining two separate instances of the Accela platform, creates a layer of complexity. The segregation complicates data integration and increases the potential for inconsistencies between the systems. Users often face challenges navigating the structure, which can hinder efficient coordination across regulatory activities or new mandates.

1.3. TERM OF CONTRACT

See ATTACHMENT 25: APPENDIX A - STATEMENT OF WORK for the contract term for software licensing and implementation services.

1.4. CURRENT ENVIRONMENT

The Department currently utilizes two separate cannabis licensing systems to manage its regulatory responsibilities. This dual-system environment limits operational efficiency, as duplicate data entry, reconciliation, and cross-system coordination are required to perform routine business processes.

1.4.1. PROPOSED ENVIRONMENT

The Contractor will propose and procure on the State's behalf a Software as a Service (SaaS) to design, develop, and implement all requirements. This section is intended to present an overview of the proposed system and as such will not specify any detailed technical requirements. A more detailed description of the proposed environment and overall project scope and requirements are included in ATTACHMENT 25: APPENDIX A - STATEMENT OF WORK and EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

1.5. AMERICANS WITH DISABILITIES ACT (ADA)

To comply with the nondiscrimination requirements of ADA, it is the policy of the State of California to make every effort to ensure that its programs, activities, and services are available to all persons, including persons with disabilities.

For persons with a disability needing a reasonable accommodation to participate in the procurement process or for persons having questions regarding reasonable accommodations of the procurement process, you may contact the Procurement Officers identified in [SECTION 2.2.1. PROCUREMENT OFFICERS](#). You may also contact the State of California at the numbers listed below.

Important: To ensure that we can meet your need, it is best that we receive your request for reasonable accommodations at least 10 working days before the scheduled event, e.g., meeting, conference, workshop, etc., or deadline due-date for procurement documents.

The California Relay Service Telephone Numbers are:

TTY/VCO/HCO to Voice	English	1-800-735-2929
	Spanish	1-800-855-3000
Voice to TTY/VCO/HCO	English	1-800-735-2922
	Spanish	1-800-855-3000
From or to Speech-to-Speech	English & Spanish	1-800-854-7784

2. BIDDING INSTRUCTIONS

2.1. BIDDER ADMONITION

This procurement will follow an approach designed to increase the likelihood of a successful proposal and Bidder eligibility for an invitation to negotiation.

The Bidder should refer to [SECTION 2.5. BIDDING STEPS](#) to understand the phases applicable to this solicitation and [SECTION 6. EVALUATION](#) to understand the evaluation process. It is the Bidder's responsibility to:

1. Carefully read the entire solicitation.
2. Submit questions in a timely manner.
3. Submit all required responses by the required dates and times specified in [SECTION 2.3. KEY ACTION DATES](#).
4. Abide by all procedures and requirements of the solicitation.
5. Not include conditional statements, assumptions, or exception language with proposals.
6. Carefully review the solicitation requirements prior to submission of a proposal to ensure nothing has been overlooked.

2.2. COMMUNICATIONS AND CONTACTS

The State uses an online procurement system known as *Cal eProcure* to communicate with prospective bidders and suppliers. Information and ongoing communications for this solicitation will be posted by the

State on the *Cal eProcure* website, www.caleprocure.com.

Oral communications by Agency/state entity officers and employees concerning this solicitation shall not be binding on the State and shall in no way excuse the bidder of any obligations set forth in this solicitation.

2.2.1. PROCUREMENT OFFICERS

The Procurement Officers are the State's designated authorized representative regarding this procurement and are the sole point of contact.

Bidders are directed to communicate all correspondence regarding this procurement to both the Procurement OfficerS and the Secondary Procurement Officer at the contact information below.

Table 2.2.1: Procurement Officers

DESCRIPTION	CONTACT INFORMATION
Department Name:	California Department of Technology (CDT), Office of Statewide Technology Procurement (OSTP)
Procurement Officer:	Hashmat Mohmand
Email:	hashmat.mohmand@state.ca.gov
Phone:	+1(916) 413-3522
Secondary Procurement Officer:	Vaibhav Srivastava
Email:	Vaibhav.Srivastava@state.ca.gov
Phone:	1-916-639-9252

2.2.2. QUESTIONS REGARDING THE SOLICITATION DOCUMENT

Bidders requesting clarification of the intent, terms and conditions, content of this solicitation, or on procedural matters regarding the competitive bid process should submit ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL via email addressed to the Procurement Officers listed in [SECTION 2.2.1. PROCUREMENT OFFICERS](#).

If the Bidder believes that one or more of the solicitation requirements is onerous, unfair, or imposes unnecessary constraints, the Bidder may request a change to the solicitation by submitting, in writing, the recommended change(s) and the facts substantiating this belief and reasons for making the

recommended change using ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL. Such request must be submitted to the Procurement Officers by the date specified in [SECTION 2.3. KEY ACTION DATES](#).

Written questions and requests for changes must be submitted, using Microsoft Excel or Word, by email to the Procurement Officers identified in [SECTION 2.2.1. PROCUREMENT OFFICERS](#), using ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL.

The email must include the solicitation identification information from the solicitation title page in the subject line. To ensure a response, questions and/or requests for changes must be received in writing by the date(s) specified in [SECTION 2.3. KEY ACTION DATES](#). Question and answer sets will be posted to Cal eProcure and will not identify the submitters. At the sole discretion of the State, questions may be paraphrased by the State for clarity.

If a Bidder desires clarification or further information on the content of the solicitation, but whose questions relate to the proprietary aspect of its proposal and disclosure exposes its proposal to other Bidders, the question may be submitted using the same criteria above with the notation, "CONFIDENTIAL." The Bidder must explain why the question is sensitive in nature. If the State concurs that the disclosure of the question or the answer would expose the proprietary nature of the proposal, the question will be answered and both the question and answer will be confidentially maintained. If the State does not concur with the proprietary nature of the question, the Bidder will be notified and may withdraw the question. If the question is not withdrawn, the question and response will not be confidentially maintained.

Only questions submitted in writing and answered in writing by the Procurement Officer shall be binding and official.

2.2.3. INTENT TO BID

Bidders that wish to participate in the solicitation should submit a completed ATTACHMENT 2: INTENT TO BID by the date specified in [SECTION 2.3. KEY ACTION DATES](#).

This document shall be sent by email to the Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICERS](#).

It shall be the Bidder's responsibility to notify the Procurement Officer regarding any change to its Intent to Bid or the contact information. The State shall not be responsible for proposal correspondence not received by the Bidder if the Bidder fails to notify the State, in writing, of any change pertaining to the designated contact person.

2.2.4. BIDDERS' LIBRARY

Throughout the solicitation, the State will make available a Bidder's Library containing reference and supporting documentation that Bidders may review and use to prepare their proposals. Bidders are encouraged to review the information in the Bidders' Library to gain a thorough understanding of the CSI Project. The Bidders' Library is accessible using the following URL: [Bidders Library](#)

The State will upload documents to the Bidders' Library as it becomes available during the course of the procurement. Additions to the Bidders' Library may be made without requiring solicitation addenda or notification to the Bidders. Bidders should check frequently for updated content.

The Bidder is encouraged to review the information in the Bidders' Library to gain a thorough understanding of this solicitation. It is each Bidder's responsibility to check for updates to the Bidders' Library.

2.2.5. REQUEST INVITATION TO STATE'S FILE-SHARING SITE

The Bidder must email the Procurement Officers by the due date specified in [SECTION 2.3. KEY ACTION DATES](#) , no more than two (2) contacts who will have access to the State's file sharing site to electronically upload Bidder's proposal. Once provided, an invitation to the State's file sharing site will be sent to those individuals. It is the Bidder's responsibility to confirm receipt of the invitation with the Procurement Officers.

The email should include the names, titles, phone numbers, and email addresses of no more than two (2) contacts.

Access to the file- sharing site will be granted within three (3) working days after receiving the email request and ATTACHMENT 6: CONFIDENTIALITY STATEMENT

Please refer to [SECTION 5.3. DELIVERY OF SUBMITTALS](#) for further instructions on how to submit your firm's proposal and instructions for the file--sharing site

2.3. KEY ACTION DATES

Key Action Dates provides the key action dates and times by which actions must be taken or completed. If the State finds it necessary to change these dates or times, it will be accomplished via an addendum to this solicitation with the exception of dates listed after the Bidder's submission of proposal. Dates listed after the Bidder's submission of proposal are estimated and may be adjusted without addendum to this solicitation. All times listed are for Pacific Time. Unless otherwise specified, all times are 5:00 PM Pacific Time.

Table 2.3: Key Action Dates (KAD)

ITEM	ACTION	DATE AND TIME
1.	Release of Solicitation	Friday, June 19, 2026
2.	Last day to submit questions and request for changes prior to proposal using ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL/ REQUEST FOR CHANGES	Friday, July 17, 2026 5:00pm PST
3.	State's response to Bidder's questions, and release of potential addendum ¹	Friday, August 14, 2026
4.	Submit: ATTACHMENT 2: INTENT TO BID FORM and ATTACHMENT 6: CONFIDENTIALITY STATEMENT FORM	Friday, August 21, 2026
5.	Last Day for Bidders to request an invitation to the State's file-sharing site to submit a proposal (Refer to SECTION 5.3. DELIVERY OF SUBMITTALS SECTION 2.2.4. REQUEST INVITATION TO STATE'S FILE-SHARING SITE)	Monday, August 24, 2026 5:00pm PST
6.	Last day to submit proposal and be deemed eVAQ approved by OSTP. ²	Monday, September 14, 2026 5:00pm PST
7.	Proposal Evaluation Period	Tuesday, September 15, 2026 - Wednesday, October 28, 2026
8.	Demonstrations	Thursday, October 29, 2026 - Thursday, December 3, 2026
9.	Cost Evaluation and Invitation to Negotiate	Friday, December 4, 2026 -

ITEM	ACTION	DATE AND TIME
		Thursday, December 10, 2026
10.	Negotiations	Friday December, 11 2026 - Monday, January 1, 2027
11.	BAFO submission	Tuesday January, 5 2027 - Monday, January 11, 2027 5:00pm PST
12.	BAFO evaluations	Tuesday, January 12, 2027 - Tuesday, January 19, 2027
13.	Notification of Award/Contract Execution	Wednesday, March 24, 2027
14.	Contract Start	TBD

¹ Or five (5) working days following the last addendum that changes the requirements of the solicitation.

² If Bidder does not have an approved eVAQ application on file with OSTP, it is recommended that Bidders allow a minimum of four weeks prior to proposal due date for the State to process and approve Bidder's eVAQ application.

2.4. RULES GOVERNING COMPETITION

This solicitation, the evaluation of responses, and the award of any resultant Contract shall be made in conformance with current competitive bidding procedures as they relate to the procurement of IT goods and services or telecommunications by public bodies in the State of California.

2.4.1. IDENTIFICATION AND CLASSIFICATION OF SOLICITATION REQUIREMENTS

The State has established certain requirements with respect to proposals to be submitted by prospective Contractors. The use of “shall,” “must,” or “will” (except to indicate simple futurity) in the solicitation indicates a requirement or condition which is mandatory.

Non-compliance with any mandatory requirement will disqualify a Bidder from further participating in Evaluation, Negotiations and Contract Award.

The words “should” or “may” in the solicitation indicate desirable attributes or conditions, but are non-mandatory in nature.

2.4.2. SOLICITATION DOCUMENTS

This solicitation document includes, in addition to an explanation of the State’s requirements which must be met, instructions which prescribe the format and content of proposals to be submitted and the model of the Contract to be executed between the State and the successful bidder.

If a bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in this solicitation document, the bidder shall immediately notify the Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICERS](#), of such error in writing and request clarification or modification of the document.

If the solicitation document contains an error known to the Bidder, or an error that reasonably should have been known, the Bidder shall bid at its own risk. If the Bidder fails to notify the State of the error prior to the date fixed for submission of proposals, and is awarded the Contract, the Bidder shall not be entitled to additional compensation or time by reason of the error or its later correction. Modifications will be made by addenda issued pursuant to [SECTION 2.4.7. ADDENDA](#).

2.4.3. EXAMINATION OF THE WORK

The Bidder should carefully examine the entire solicitation document and any addenda thereto, and all related materials and data referenced in the solicitation document or otherwise available to the Bidder, and should become fully aware of the nature and location of the work, the quantities of the work, and the conditions to be encountered in performing the work.

2.4.4. EXCLUSION FOR CONFLICT OF INTEREST

No consultant shall be paid out of State funds for developing recommendations on the acquisition of information technology (IT) products or services or assisting in the preparation of the project approval

lifecycle documents (stages 2, 3, or 4) or feasibility study, while in effect, if that consultant is to be a source of such acquisition or could otherwise directly and/or materially benefit from State adoption of such recommendations or the course of action recommended in the project approval lifecycle documents (stages 2, 3, or 4) or feasibility study. Further, no consultant shall be paid out of State funds for developing recommendations on the disposal of State surplus IT products if that consultant would directly and/or materially benefit from State adoption of such recommendations.

A consultant shall not be eligible to serve as the Prime Contractor or subcontractor pursuant to this solicitation if the Contractor/subcontractor is currently working on the solicitation in an Independent Verification and Validation (IV & V) role.

The Bidder must complete and submit ATTACHMENT 3: FOLLOW-ON CONTRACT DISCLOSURE FORM with its proposal

2.4.5. CONFIDENTIALITY

Bidder material becomes public only after the Notification of Award is released. If material marked “confidential,” “proprietary,” or “trade secret” is requested pursuant to the Public Records Act, the State will make an independent assessment whether it is exempt from disclosure. If the State disagrees with the Bidder, the State will notify the Bidder and give them a reasonable opportunity to justify their position or obtain a court order protecting the material from disclosure.

The Bidder should be aware that marking a document “confidential” or “proprietary” in a proposal may exclude it from consideration for award and will not keep that document from being released after notice of award as part of the public record, unless a court has ordered the State not to release the document.

The content of all working papers and discussions relating to the Bidder’s proposal shall be held in confidence indefinitely, unless the public interest is best served by an item’s disclosure because of its direct pertinence to a decision, agreement or the evaluation of the proposal.

Any disclosure of confidential information by the Bidder may be the basis for rejecting the Bidder’s proposal and ruling the Bidder ineligible to further participate. Any disclosure of confidential information by a State employee is a basis for disciplinary action, including dismissal from State employment, as provided by Government Code §19570 et seq. Total confidentiality is paramount; it cannot be over emphasized.

2.4.6. BONDS

The State reserves the right to require a performance bond or other security document as specified in the solicitation from the bidder in an amount not to exceed the amount of the Contract. In the event the State requires a surety bond that has not been expressly required by the solicitation, the State will reimburse the

bidder as an addition to the purchase price in an amount not exceeding the standard premium on such bond.

2.4.7. ADDENDA

The State may modify the solicitation at any time prior to submission of proposal by issuing an addendum. Addenda will be numbered consecutively and released to all Bidders via Cal eProcure.

The Bidder is allowed five (5) working days to submit written questions regarding the addendum according to the instructions contained in [SECTION 2.2.2. QUESTIONS REGARDING THE SOLICITATION DOCUMENT](#).

2.4.8. COST FOR DEVELOPING PROPOSAL

Costs for developing proposals are the responsibility entirely of the bidder and shall not be chargeable to the State.

2.4.9. IRREVOCABLE OFFER

Bidder's response to this solicitation shall constitute a firm offer, which shall remain irrevocable for not less than 180 calendar days following the Contract Award date specified in [SECTION 2.3. KEY ACTION DATES](#). In the event of a delay in Contract Award, a Bidder may extend the expiration date of its firm offer an additional 30 calendar days by written notice to the State.

This expiration date may be further extended by mutual agreement between the State and the Bidder, in order to accommodate processing time for required approvals and other solicitation-related reviews.

2.4.10. FALSE OR MISLEADING STATEMENTS

Proposals which contain false or misleading statements, or which provide references that do not support an attribute or condition claimed by the bidder, may be rejected. If, in the opinion of the State, such information was intended to mislead the State in its evaluation of the proposal, and the attribute, condition, or capability is a requirement of this solicitation document, it will be the basis for rejection of the bidder's proposal.

2.5. BIDDING STEPS

The following instructions provide the steps to submit a response to this solicitation by interested Bidders. Details surrounding proposals are described further in [SECTION 3. PROPOSAL REQUIREMENTS](#).

The Bidder is expected to follow the format requirements and utilize all forms included in this solicitation

necessary for its response. This solicitation also addresses the Bidder responsibilities and requirements it must meet to be eligible for consideration. If the Bidder fails to follow the provided instructions, the Bidder may be disqualified from the solicitation process.

Refer to [SECTION 2.3. KEY ACTION DATES](#) to determine which phases and mandatory steps are included in this solicitation. [SECTION 2.3. KEY ACTION DATES](#) lists milestones, mandatory steps, and due dates for deliverables in this solicitation. Bidders must submit a pre-qualified Electronic Vendor Application of Qualifications (eVAQ) as detailed in +vendor +[SECTION 3.2.8. PRE-QUALIFIED VENDOR APPLICATION OF QUALIFICATION](#).

2.5.1. FINAL PHASE

The final phase consists of a proposal (Mandatory) and, if requested by the State, a Best and Final Offer (BAFO).

The purpose of the final phase is to obtain proposals that are responsive in every respect. The proposal is a mandatory step for all Bidders

The proposal must be complete, and include all cost information, required signatures, contract changes issued by the State via an addendum. Bidders that submitted proposals meeting the criteria identified in [SECTION 6. EVALUATION](#), may be eligible to receive an invitation to negotiate with the State.

The State, at its sole discretion, may request a BAFO from those Bidders that participated in the Negotiation Process as identified in [SECTION 7. NEGOTIATIONS](#).

2.5.2. WITHDRAWAL AND RESUBMISSION/MODIFICATION OF PROPOSALS

A Bidder may withdraw its proposal at any time prior to the proposal submission date by submitting a written notification of withdrawal signed by an authorized representative of the Bidder in accordance with [SECTION 3.2.1. COVER LETTER \(M\)](#) . The Bidder may thereafter submit a new or modified proposal prior to the submission date and time specified in [SECTION 2.3. KEY ACTION DATES](#) . Modification offered in any other manner, oral or written, will not be considered. Other than as allowed by law, proposals cannot be changed after the deadline date and time designated for receipt, except as provided in the solicitation.

2.5.3. DISPOSITION OF PROPOSALS

All materials submitted in response to this solicitation will become the property of the State of California. All phases of the proposal shall be retained for official files and will become a public record after the Notification of Award is posted.

3. PROPOSAL REQUIREMENTS

This section contains the mandatory scored, mandatory optional, and desirable scored proposal requirements that must be met in order to be considered responsive to this solicitation.

The documents that must be submitted with the Bidder's proposal are noted as "Mandatory" "(M)", "Mandatory Scored" "(MS)", or "Mandatory Optional" "(MO)" in this section. Items labeled "Desirable Scored" "(DS)" are optional.

The proposal requirements listed in this section are denoted as follows:

1. (M) Sections labeled as "Mandatory" or "M" are not negotiable. To be considered responsive to these requirements, all requirements identified as (M) must receive a response from the Bidder. Failure to respond to any (M) requirements where indicated shall result in a "fail" and disqualification of the proposal.
2. (MS) Sections labeled "Mandatory Scored" or "MS" are not negotiable. To be considered responsive to these requirements, all requirements identified as (MS) must receive a response. Failure to respond to any (MS) requirement where indicated shall result in a "fail" and disqualification of the proposal. The State's evaluation team will review responses to (MS) requirements and award points, if applicable, per criteria stated in [SECTION 6. EVALUATION](#).
3. (MO) Sections labeled "Mandatory Optional" or "MO" are not negotiable. To be considered responsive to these requirements, all requirements identified as (MO) must receive a response. Failure to respond to any (MO) requirement where indicated shall result in a "fail" and disqualification of the proposal. It is at the State's option/discretion on whether to utilize the option in the Contract.
4. (DS) Sections labeled "Desirable Scored" or "DS" are not required to be offered by the Bidder in order to be responsive with the solicitation requirements. The Bidder may choose whether to meet requirements labeled as (DS). However, if a Bidder offers any of these (DS) requirement, the Bidder must meet the mandatory requirements as stated in the section. The State will review responses to (DS) requirements and apply points, if applicable, per criteria stated in [SECTION 6. EVALUATION](#).
5. (O) Sections labeled as "Optional" or "O" are not required to be offered by the Bidder in order to be responsive to the solicitation requirements. A Bidder may choose whether to meet administrative requirements labeled as (O) such as those relating to preference points. However, if a Bidder offers any of these (O) requirements, the Bidder must meet the mandatory requirements as stated in the section. The State will review responses to optional requirements and apply points, if applicable, in accordance with [SECTION 6. EVALUATION](#).

3.1. PREQUALIFICATION REQUIREMENTS

This section details the requirements necessary for Bidders to qualify for contract award. Failure to complete or comply will disqualify Bidder(s) and the State will not move forward with evaluating the proposal, conducting negotiations and contract award. The State will not seek modifications or clarifications after proposal submission due date for any prequalification requirements.

3.1.1. ELECTRONIC VENDOR APPLICATION OF QUALIFICATIONS (EVAQ)(M)

It is the responsibility of the Bidder to ensure they have an OSTP-approved eVAQ and all applicable requirements and provisions for this solicitation are met. Failure to have an OSTP-approved eVAQ prior to proposal submission due date will disqualify Bidder(s) and the State will not move forward with evaluating the proposal, conducting negotiations and contract award. The State will not seek eVAQ modifications or clarifications after proposal submission due date.

The State's eVAQ is an external process to this solicitation. The intent of the pre-qualification is to process as much of the administrative requirements required to do business in the State of California in advance to streamline the solicitation process. Bidders are required to have an OSTP-approved eVAQ application on file prior to the Key Action Date for the Last day to submit proposal (refer to [SECTION 2.3. KEY ACTION DATES](#)) in order for your proposal to be accepted for evaluations.

The application can be accessed at <https://cadtprod.service-now.com/vendor>.

If the Bidder's firm is new to the eVAQ process, account registration is necessary and free of charge.

If a Bidder has an approved eVAQ on file, it is the Bidder's responsibility to ensure:

1. The eVAQ is a CDT OSTP-approved eVAQ (not a Department of General Services (DGS) eVAQ)).
2. All information required to be submitted with the eVAQ is up to date and valid.

All questions related to the eVAQ should be addressed to the Procurement Officers.

3.1.1.1. INCORPORATION OF EVAQ REQUIREMENTS

The Contract awarded as a result of the solicitation shall incorporate by reference all the requirements of the solicitation and the terms and conditions of the eVAQ. The Bidder's eVAQ shall remain in effect throughout the life of the Contract, including all optional years.

In the event there is inconsistent requirements between the solicitation and the Bidder's OSTP approved eVAQ documents, the solicitation documents shall take precedence.

3.2. ADMINISTRATIVE REQUIREMENTS

This section contains the mandatory and optional administrative requirements that must be met in order to be considered responsive to this solicitation. Additional administrative requirements for this solicitation are being processed through the electronic Vendor Application of Qualifications (eVAQ). Please refer to [SECTION 3.1.1. ELECTRONIC VENDOR APPLICATION OF QUALIFICATIONS \(EVAQ\)\(M\)](#) for more information.

3.2.1. COVER LETTER (M)

The Bidder must complete and submit ATTACHMENT 4: COVER LETTER FORM with their proposal.

A cover letter shall be considered an integral part of the proposal and any proposal form requiring signature, must be signed by an individual who is authorized to bind the bidding firm contractually. The signature block must indicate the title or position that the individual holds in the firm. An unsigned proposal may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The draft proposal, if applicable, must also contain the cover letter, including the title of the person who will sign, but need not contain the signature.

3.2.2. ADMINISTRATIVE REQUIREMENTS DOCUMENT (M)

The Bidder must complete and submit ATTACHMENT 5: RESPONSE TO ADMINISTRATIVE REQUIREMENTS. The Bidder must indicate its willingness and ability to satisfy these requirements by responding "Yes" in the "Bidder Agrees Yes/No" column. A "No" response to any of the mandatory administrative requirements may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

3.2.3. CONFIDENTIALITY STATEMENT (M)

The bidder must agree to the State's confidentiality requirements by submitting a signed ATTACHMENT 6: CONFIDENTIALITY STATEMENT, for the bidder's company. The completed confidentiality statement must be submitted with as indicated in [SECTION 2.3. KEY ACTION DATES](#) .

The Bidder engaging in services pertaining to this solicitation, requiring contact with confidential State information or State customer information will be required to exercise security precautions for all such data that is made available and must accept full legal responsibility for the protection of this confidential information. This includes all statistical, personal, technical, and/or other confidential personal data and information relating to the State's operations that are designated confidential by the State.

The Bidder will also be required, upon Contract award, to submit a signed confidentiality statement from

all personnel, agents, and subcontractors assigned to the awarded Contract.

3.2.4. ABILITY TO PERFORM

Prior to award of the Contract, the State must be assured that the bidder selected has all of the resources to successfully perform under the Contract. This includes, but is not limited to, personnel in the numbers and with the skills required; equipment of appropriate type and in sufficient quantity; financial resources sufficient to complete performance under the Contract; and experience in similar endeavors. If, during the evaluation process, the State is unable to assure itself of the bidder's ability to perform under the Contract if awarded, the State has the option of requesting from the bidder any information that the State deems necessary to determine the bidder's responsibility. If such information is required, the bidder will be so notified and will be permitted five (5) state business days to submit the information requested in writing. Examples of the type of financial responsibility information requested may include annual reports and current audited balance sheets for the bidder's firm.

3.2.5. PRIMARY BIDDER

An award, if made, will be to a primary bidder. The awarded primary bidder will be responsible for successful performance of all subcontractors and support services offered in response to this solicitation. All State policies, guidelines, and requirements that apply to the primary bidder also apply to subcontractors, as applicable to the products and services they provide and to their role as a subcontractor. Furthermore, the State will consider the primary bidder to be the sole point of contact regarding contractual matters for the term of the resulting Contract. The bidder shall not assign financial documents to a third-party without prior written approval by the State, and an amendment to the resulting Contract.

3.2.6. SUBCONTRACTORS

Nothing contained in the resulting Contract shall create any relationship between the State and any subcontractors, and no subcontract shall relieve the Bidder of its responsibilities and obligations. The bidder is fully responsible to the State for the acts and omissions of its subcontractors and of persons either directly or indirectly employed by them.

The Contractor shall not change subcontractor(s) and/or DVBE subcontractor(s) if such changes conflict with the work to be performed under this Contract. For DVBE subcontractor changes, the Contractor shall utilize another DVBE subcontractor. The State recognizes that changes to subcontractor(s) may be necessary and in the best interests of the State, however, advance notification of a contemplated change and the reasons for such change must be made to the State no less than seven (7) business days prior to the existing subcontractor's termination. If this should occur, the Contractor should be aware that the State Contract administrator or designee must approve any changes to the subcontractor(s) prior to the

termination of the existing subcontractor(s). This also includes any changes made between submittal of the Final Proposal and actual start of the Contract.

Contractor understands and agrees to comply with the requirements set forth in Military and Veterans Code, Section 999 et seq. that should award of this contract be based in part on their commitment to use the Disabled Veteran Business Enterprise (DVBE) subcontractor(s) identified in their bid or offer, per Military and Veterans Code, Section 999.5(f), a DVBE subcontractor may only be replaced by another DVBE subcontractor and must be approved by both the awarding department and the Department of General Services (DGS) prior to the commencement of any work by the proposed subcontractor. Changes to the scope of work that impact the DVBE subcontractor(s) identified in the bid or offer and approved DVBE substitutions will be documented by contract amendment.

Failure of Contractor to seek substitution and adhere to the DVBE participation level identified in the bid may be cause for Contract termination, recovery of damages under rights and remedies due to the State, and penalties as outlined in MVC, Section 999.9; Public Contract Code (PCC), Section 10115.10.

The State will not compensate the Contractor for any of the Contractor's time or effort to educate or otherwise make the new subcontractor(s) ready to begin work on the contract.

The Contractor's obligation to pay its subcontractors is an independent obligation from the State's obligation to pay or to enforce the payment of any money to any subcontractor. Contractor is solely responsible for any payments to or claims made by subcontractors. As a result, the State shall have no obligation to pay or to enforce the payment of any monies to any subcontractor.

3.2.6.1. BIDDER DECLARATION FORM (M)

The bidder must complete and submit ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105 , with its Final Proposal. When completing the declaration, the bidder must identify all subcontractors proposed for participation in the Contract. The bidder awarded the Contract is contractually obligated to use the subcontractors for the corresponding work identified, unless the Agency/state entity agrees to a substitution and it is incorporated, in writing. If the bidder is not using subcontractors, the bidder must still complete ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105 answering the applicable questions on the form, and submit it with its Final Proposal. The form is available at:

<https://www.documents.dgs.ca.gov/dgs/fmc/gspd/gspd05-105.pdf>

3.2.7. AMENDMENT

Any Contract executed as a result of this solicitation may be amended consistent with the terms and conditions of the Contract and by mutual consent of both parties, subject to approval by the Office of Statewide Technology Procurement.

3.2.8. FINANCIAL RESPONSIBILITY INFORMATION

In order to minimize the potential risk of default due to financial issues, the State reserves the right to request additional documentation throughout the life of the awarded Contract.

The State must be assured that the Contractor continues to have the financial resources to sustain its operations during the term of the Contract.

3.2.9. GENERAL PROVISIONS

The Contract awarded as a result of this solicitation shall automatically incorporate by reference the following:

- Information Technology General Provisions - Cloud (Revised 2/20/2025)
 - <https://www.dgs.ca.gov/%7E/media/Divisions/PD/Acquisitions/Solicitation-Documents/Attachments/IT-General-Provisions-Cloud-DGS-PD-402ITGP-Revised-02202025.pdf>

As a condition of submitting a response to this solicitation, the Bidder agrees to abide by all terms and conditions of the solicitation as written. The Bidder is advised that deviations from the State-approved Terms and Conditions may be the basis for rejection of the Bidder's proposal.

The State may consider limited negotiations around its standard terms, including the General Provisions, during the negotiation phase of the solicitation. Any negotiation of the General Provisions shall be limited to those provisions of the General Provisions that explicitly allow for changes by adding terms and conditions to the Statement of Work. Any changes to the State's standard terms, including the General Provisions, shall be at the sole and absolute discretion of the State.

Per State's Cloud Smart Computing Policy, Agencies/State entities must first consider CDT Managed Cloud Services or CDT approved cloud service offerings. These service options include Software as a Service (SaaS), Platform as a Service (PaaS) and Infrastructure as a Service (IaaS). Refer to ATTACHMENT 28: APPENDIX A - STATEMENT OF WORK, SECTION 10. State Data Center or Contractor Hosted Facility Environment for specific hosting requirements for this solicitation.

3.2.10. GENERATIVE ARTIFICIAL INTELLIGENCE (GENAI) DISCLOSURE NOTIFICATION

The State of California seeks to realize the potential benefits of GenAI, through the development and deployment of GenAI, while balancing the risks of these technologies.

Bidder must notify the State in writing if it: (1) intends to provide GenAI as a deliverable to the State; or (2), intends to utilize GenAI, including GenAI from third parties, to complete all or a portion of any

deliverable that materially impacts: (i) functionality of a State system, (ii) risk to the State, or (iii) Contract performance. For avoidance of doubt, the term "materially impacts" shall have the meaning set forth in State Administrative Manual (SAM) [4986.2](#).

Failure to report GenAI to the State may result in disqualification. The State reserves its right to seek any and all relief it may be entitled to as a result of such non-disclosure.

Upon notification by a Bidder of GenAI as required, the state reserves the right to incorporate GenAI Special Provisions into the final contract or reject bids that present an unacceptable level of risk to the State.

Government Code [11549.64](#) defines "Generative Artificial Intelligence (GenAI)" as an artificial intelligence system that can generate derived synthetic content, including text, images, video, and audio that emulates the structure and characteristics of the system's training data.

The Bidder must complete and submit as part of the proposal response, ATTACHMENT 4: COVER LETTER FORM, notifying the State if it intends to provide or utilize GenAI by responding "Yes" or "No" in the "Bidder Agrees Yes/No" column.

3.2.11. STATEMENT OF WORK (M)

ATTACHMENT 25: APPENDIX A - STATEMENT OF WORK identifies and describes the tasks and responsibilities of the Contractor and the responsibilities of the State during the term of the Contract.

The bidder is advised that deviations to the SOW may be the basis for rejection of the bidder's Final Proposal. Refer to Part 2, Bidder Response ATTACHMENT 25: APPENDIX A - STATEMENT OF WORK.

3.2.11.1. INSURANCE COVERAGE

In accordance to the ATTACHMENT 25: APPENDIX A - STATEMENT OF WORK, [SECTION 33. Insurance Requirements](#). Insurance Requirements, the Contractor must furnish insurance certificate(s) evidencing required insurance coverage acceptable to the State, including endorsements showing the State as an "additional insured" if required under the Contract. Any required endorsements requested by the State must be separately provided; merely referring to such coverage on the certificates(s) is insufficient for this purpose. When performing work on State-owned or controlled property, Contractor shall provide a waiver of subrogation in favor of the State for its workers' compensation policy.

The prime Contractor shall agree to furnish the State with satisfactory evidence of insurance within ten (10) calendar days of Contract award.

3.2.12. PRODUCTIVE USE REQUIREMENTS

The productive use requirements protect the State from new equipment and software having no record of proven consistent performance. The State will only accept proven technology products.

The proposed solution must include only equipment and off-the-shelf software that is currently supported by its manufacturer for at least the time specified in Table 3.2.12.1-1, Productive Use Timeframes. No equipment and/or software may be proposed, specified, or employed if the manufacturer has announced an end to support. The productive use requirements defined in this section do not apply to any portion of the custom software developed for the State or to modifications to custom software that was developed for the State under this Contract prior to submittal and throughout Contract duration.

3.2.12.1. CUSTOMER IN-USE

The State requires each equipment and software component proposed as part of an automated system adhere to the following:

1. Must have been installed and in productive use;
2. For a paying customer external to the Bidder's organization; and
3. For at least the number of months shown in Table 3.2.12.1-1 below and prior to the final proposal submission date.

Table 3.2.12.1-1: Productive Use Timeframes

PRODUCT	PROJECT COST	PROPOSAL SUBMISSION
Category 1 - Critical Software Software that is required to control the overall operation of a computer system or peripheral equipment. Included in this category are operating systems, database management systems, language interpreters, assemblers and compilers, communications software, and other essential system software.	More than \$100,000	6 months

Design changes in required system control modules or in components critical to the processing requirements of the State's workload are also subject to the In-Use Requirement. Increases or decreases in numbers of components or minor alteration in equipment or minor modifications or updates to software to provide improvements or features, to correct errors, or to accommodate hardware changes may be exempt from the In-use requirement by CDT OSTP, if no changes in logic, architecture or design are involved.

3.2.12.2. CUSTOMER REFERENCES FOR PRODUCTIVE USE REQUIREMENTS (M)

The purpose of the customer reference requirement is to provide the State the ability to verify the claims made in the proposal by the Bidder.

The Bidder must provide a list of customers who presently have the bid equipment and/or software installed and operating. If [SECTION 3.2.12.1. CUSTOMER IN-USE](#), is used, the list must include at least one (1) customer meeting that requirement. However, at least one customer reference must be included for each type of machine and feature bid that is subject to the requirements of that section (i.e., one customer having the specific CPU).

The State has the option to request from the Bidder supporting evidence of compliance to the customer in-use requirements. Supporting evidence could include, but is not necessarily limited to, one or more of the following:

- Customer purchase order or Contract showing installation dates for subject equipment or software;
- Acceptance document containing verification of installation by a paying customer;
- Customer invoice for subject equipment or software;
- Shipping invoice or bill of lading;
- Dated maintenance records;
- Sworn notarized statement from an officer of the bidding firm and/or a paying customer;
- State visit to the site of a paying customer.

The State will not consider exceptions to productive use requirements for this solicitation.

3.2.12.3. HARDWARE/EQUIPMENT

All equipment offered must be new and the latest model in current production. Used, shopworn, refurbished, demonstrator, prototype, or discontinued models are not acceptable.

3.2.12.4. OPEN SOURCE SOFTWARE REQUIREMENTS

If the Bidder's proposed solution includes Open Source software, the Open Source software must adhere to [SECTION 3.2.12. PRODUCTIVE USE REQUIREMENTS](#), CDT Technology Letter #TL 18-02, SAM 4819.2, and SAM 4984; ITPL-01. The CDT Technology Letter #TL 18-02 can be found at the following URL:

https://cdt.ca.gov/wp-content/uploads/2018/05/TL-18-02-OSCodeReuse_2018-0419.pdf

3.2.13. SOCIOECONOMIC PROGRAMS

Bidders who claim any of the socioeconomic program points will be evaluated to determine whether they submitted the required forms, documents, exhibits, attachments and/or the responses necessary to validate their qualification and eligibility for the claimed preference(s). If the State determines that the submitted information is insufficient or that the required documents do not otherwise validate the eligibility for points in any of the claimed programs, then the points for that program will not be added to the Bidder's final overall proposal score. If the State is able to validate the Bidder's claim, the qualified preference points will be applied to the Bidder's final overall proposal score provided that the Bidder's proposal is not otherwise determined to be non-responsive to any mandatory requirements.

Completed Small Business and Disabled Veteran Business Enterprise certification applications and required support documents must be submitted to the Department of General Services Office of Small Business and DVBE Services (OSDS) no later than 5:00 p.m. on the proposal due date, and the OSDS must be able to approve the application as submitted. Questions regarding certification should be directed to the OSDS at

Office of Small Business and DVBE Services
707 Third Street, 1st Floor, Room 400
West Sacramento, CA 95606
Receptionist: (916) 375-4940 Fax (916) 375-4650

3.2.13.1. BIDDER'S PREFERENCE AND INCENTIVE DECLARATION

The Bidder must complete and submit ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES, with its proposal. The Bidder must indicate on ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES whether it is or is not claiming each preference and/or incentive.

3.2.13.2. DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PROGRAM

The Disabled Veteran Business Enterprise (DVBE) Participation Goal Program for State contracts are established in Public Contract Code (PCC), §10115 et seq., Military and Veterans Code (MVC), §999 et seq., and California Code of Regulations (CCR), Title 2, §1896.60 et seq.

Information regarding the DVBE Program Requirements may be viewed at:

<https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Apply-for-or-Re-apply-as-Small-Business-Disabled-Veteran-Business-Enterprise>

The Bidder who has been certified by California as a DVBE (or who has obtained the participation of subcontractors certified by California as a DVBE) must submit a completed form(s) STD.843 Disabled

Veteran Business Declarations for each DVBE. All disabled veteran owners and disabled veteran managers of the DVBE(s) must sign a form for each DVBE and submit as ATTACHMENT 10: DVBE DECLARATIONS.

Please read these requirements carefully. Failure to comply with the minimum DVBE Participation Requirement may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

3.2.13.2.1. DVBE PARTICIPATION REQUIREMENT

For the purposes of this solicitation, the DVBE Participation Requirement has been waived.

3.2.13.2.2. DVBE INCENTIVE (O)

In accordance with Military and Veterans Code §999.5(a), an incentive will be given to all Bidders who claim DVBE participation. For Contract award evaluation purposes only, the State shall apply the incentive amount based on the amount of DVBE participation obtained.

If the Bidder is claiming a DVBE incentive, the Bidder must complete the following with its proposal for each DVBE:

1. ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105 ;
2. [ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES](#) ;
3. [ATTACHMENT 10: DVBE DECLARATIONS](#) ; and,
4. [ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION \(CUF\) CERTIFICATION](#) .

3.2.13.3. SMALL BUSINESS PREFERENCE (O)

The California Government Code §14835 et seq. requires that a five percent (5%) preference be given to Bidders who qualify as a Small Business (SB). The rules and regulations of this law, including the definition of a SB, or qualifying non-small business, are contained in Title 2, California Code of Regulations, §1896 et seq. The definition of nonprofit veteran service agencies qualifying as a SB is contained in §999.50 et seq. of the Military and Veterans Code.

If the Bidder is claiming a Small Business Preference, the Bidder must complete and submit the following with its proposal for each SB:

1. ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105;
2. ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES; and,
3. ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION.

More information regarding the Small Business Preference may be found at:

<https://www.dgs.ca.gov/PD-OSDS>

3.2.13.4. NON-SMALL BUSINESS SUBCONTRACTOR PREFERENCE (O)

A five percent (5%) proposal preference is available to Bidders who qualify as a non-small business claiming at least 25% California-certified small business subcontractor participation. If claiming the non-small business subcontractor preference, the Bidder's response must include a list of the small businesses with which the firm commits to subcontract in an amount of at least 25% of the net proposal price with one (1) or more California-certified small businesses. Each listed certified small business must perform a "commercially useful function" in the performance of the Contract as defined in Government Code §14838(b)(1)(2).

The preference to a non-small business firm that commits to small business or microbusiness subcontractor participation of 25% of its net proposal price shall be given five percent (5%) of the highest responsive firm's total score. A non-small business that qualifies for this preference, may not take an award away from a certified small business.

If the Bidder is claiming a non-small business using small business subcontractors, the Bidder must complete and submit the following with its proposal for each SB Subcontractor:

1. ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105;
2. ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES; and,
3. ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION.

3.2.13.5. COMMERCIALLY USEFUL FUNCTION (M, IF APPLICABLE)

All certified small business, micro business, and/or DVBE Contractors, subcontractors or suppliers must meet the commercially useful function requirements under Government Code Section 14837 (for SB), Military and Veterans Code Section 999 (for DVBE), and Title II California Code of Regulations, Section 1896.4 and 1896.62.

A Contractor, subcontractor, or supplier will not be considered to perform a commercially useful function if the Contractor's, subcontractor(s), or supplier's role is limited to that of an extra participant in the transaction, the awarded Contract, or project through which funds are passed to obtain the appearance of small business or micro business participation.

The Bidder must complete ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION for each Small Business and/or DVBE (prime and/or subcontractor(s)). All Bidders and subcontractors identified in the proposal response to fulfill the requirements for one (1) or more of the socio-economic programs (DVBE and small business) must perform a commercially useful function (CUF) in the resulting Contract. CUF is defined pursuant to Military and Veterans Code §999(b)(5)(B) and

Government Code §14837(d)(4)(A) for the DVBE and small business programs, respectively.

Bidder(s) may be required to submit additional written clarifying information regarding CUF on ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION. Failure to submit the requested written information as specified may be the basis for rejection of the Bidder's proposal.

3.2.13.6. TARGET AREA CONTRACT PREFERENCE ACT (TACPA) (O)

Target Area Contract Preference Act (TACPA) will be granted to California-based firms in accordance with Government Code §4530 whenever contracts for goods or services are in excess of \$100,000 and the Bidder meets certain requirements as defined in the California Administrative Code (Title 2, §1896.30 et seq.) regarding labor needed to produce the goods or provide the services being procured. The TACPA is optional on the part of the Bidder (not mandatory), is for proposal evaluation purposes only, and does not alter the amount of the awarded Contract.

Bidders wishing to take advantage of this preference will need to review the website below and submit the appropriate response forms as ATTACHMENT 12: TACPA PREFERENCE REQUEST FORMS with its Final Proposal.

The required applications/forms are as follows:

- TACPA (Std. 830)
- Bidder's Summary of Contract Activities and Labor Hours (DGS/PD 525)
- Manufacturer Summary of Contract Activities and Labor Hours (DGS/PD 526).

<https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Request-Target-Area-Contract-Preference?search=tacpa>

3.3. QUALIFICATION REQUIREMENTS

The Bidder is expected to have a proven record of success and be responsible for all aspects of the service, including any subcontractors and the project team/staff proposed.

The Bidder must meet the mandatory Bidder Qualification and Key Staff Qualification Requirements. Failure to meet any of the mandatory requirements shall result in a proposal being deemed non-responsive and therefore disqualified.

3.3.1. BIDDER QUALIFICATIONS (M) (DS)

The Bidder must complete and submit as part of the proposal response, ATTACHMENT 14: BIDDER QUALIFICATIONS FORM, to confirm that the Bidder's experience meets all the minimum requirements identified in ATTACHMENT 14: BIDDER QUALIFICATIONS FORM, It is incumbent upon the Bidder to

provide enough detail in proposal for the state to evaluate the Bidder's ability to meet the requirements and perform the services as described in this solicitation. Refer to ATTACHMENT 13: BIDDER QUALIFICATIONS FORM - INSTRUCTIONS for further requirements and instructions.

A separate ATTACHMENT 14: BIDDER QUALIFICATIONS FORM must be submitted for every project used to meet the minimum required experience.

Unless stated otherwise, experience must have occurred within the last eight (8) years prior to the solicitation due date for all projects, unless stated otherwise, and must have been completed in the United States of America. Points will be awarded based on desirable experience in accordance with [SECTION 6. EVALUATION](#).

3.3.2. BIDDER REFERENCES (MS)

The Bidder must complete and submit as part of proposal, ATTACHMENT 15: BIDDER REFERENCE FORM for each of the projects cited on the corresponding ATTACHMENT 14: BIDDER QUALIFICATIONS FORM.

The purpose of the Bidder reference requirement is to provide the State the ability to evaluate the Bidder's experience in providing similar or relevant services to other organizations through a satisfaction rating provided by the Bidder's previous project clients. The description of their projects must be detailed and comprehensive enough to permit the State to assess the similarity of those projects to the work anticipated for the Contract resulting from this solicitation.

ATTACHMENT 15: BIDDER REFERENCE FORM must be completed in its entirety and dated by a reference that performed a management, product owner or supervisory role on the reference project to be considered responsive. The ATTACHMENT 15: BIDDER REFERENCE FORM must be returned to the Bidder for submission with proposal. No information corrections or changes may be made on the reference form by the Bidder. Forms with alterations or changes to the entered information may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

References may be contacted to validate submitted responses based on customer satisfaction in accordance with [SECTION 6. EVALUATION](#). References must be external to a Bidder's organization and corporate structure. Failure to provide verifiable references may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

References must meet the following criteria:

- Must be from the company (customer) or Agency for which the project was developed and/or services provided.
- Must be someone who performs a management, product owner or supervisory role on the

referenced project.

- Must be external to the Bidder's organization and corporate structure.
- Must not be from employees or individuals who have or are currently working for the Bidder.
- Amendments to contracts shall not be considered separate and distinct contracts and cannot be used as separate projects.
- Must be able to provide an objective evaluation of the proposed Bidder and/or Key Staff's performance.

If the reference is not allowed either legally or by company/organization policy to sign the reference form, the reference must type in its full name.

Prior to the Bidder using a current State employee as a reference, the Bidder shall contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICERS](#), to ensure the current State employee is not a member of the Evaluation Team. In addition, only one (1) reference from the DCC is permitted.

3.3.3. KEY STAFF QUALIFICATIONS (M) (DS)

The Bidder is fully responsible for all necessary staffing resources to successfully conduct implementation within the agreed upon schedule and to perform to the standards set forth in [SECTION 35. Service Level Agreements \(SLAs\)](#). The Bidder's staff may be comprised of Contractor Key Staff, critical Non-Key Staff, and any other Non-Key Staff that the Bidder requires to implement the Solution. A minimum of five (5) Contractor Key Staff are required to fill the roles required in the SOW. Additional Contractor staff may also be necessary, at no additional cost to the State.

The Bidder must complete and submit Key Staff Qualification forms. The Bidder must provide complete information to confirm that each of the five (5) proposed Key Staff possess the experience and qualifications as specified for their project role. Refer to ATTACHMENT 16: KEY STAFF QUALIFICATIONS FORM – INSTRUCTIONS for further requirements and instructions.

The Bidder may cite as many projects as needed per proposed Key Staff to meet the requirements.

Each cited project for each Key Staff must be submitted separately on the appropriate form. It is incumbent upon the Bidder to provide enough detail in the response for the State to evaluate the Bidder's proposed Key Staff's ability to meet the requirements and perform the services as described in this solicitation and the SOW.

The Bidder's proposed Key Staff must meet all the mandatory minimum qualification requirements. All experience used to meet the minimum requirements must have occurred within the last eight (8) years, unless stated otherwise, prior to the proposal due date. The same resource cannot be assigned to meet multiple roles. Points will be awarded to Bidders that meet the criteria set forth in the desirable experience

qualifications as specified in [SECTION 6. EVALUATION](#).

The following Key Staff are required to perform the services as described in ATTACHMENT 25:
APPENDIX A - STATEMENT OF WORK:

- Project Manager
- Scrum Master
- Business Analyst Lead
- Configuration Lead
- Technical Architect Lead

3.3.3.1. FULL-TIME/PART-TIME MONTH EQUIVALENTS DEFINITION

For each experience requirement (marked by “x”) that is met or partially met on the referenced project, specify the number of full-time month equivalent (FTE) experience that the Staff accrued on the referenced project. For each period in which the Staff performed work applicable to the claimed experience for a minimum of twenty (20) workdays of a minimum total of one hundred sixty (160) hours (the minimum required to represent working full-time), the Staff accrues one (1) full-time month equivalent experience.

To calculate and report the full-time month equivalents experience for Staff who worked part-time (partial) on a referenced project, use the following calculation:

If the Staff worked half ($\frac{1}{2}$) time on a referenced project, experience should be pro-rated to one-half ($\frac{1}{2}$) or 0.5 month full-time month equivalent experience for each period in which the staff person worked a minimum of eighty (80) hours over twenty (20) State Business Days in a month.

For each experience requirement that the Staff’s work on a referenced project addresses, report the total number of full-time month equivalents’ experience the Staff’s work represents using the calculations as previously described in this section, which depend upon the time period (calendar period) during which the Staff worked on the referenced project and whether he/she worked on a full-time or some other basis.

Refer to the details in [SECTION 6. EVALUATION](#) on how the requirements will be scored as part of the overall evaluation.

3.3.4. KEY STAFF REFERENCES (MS)

The Bidder must complete and submit as part of its proposal a Key Staff Reference Forms for each of the projects cited on the corresponding Key Staff Qualifications Form.

The purpose of the Key Staff reference requirement is to provide the State the ability to evaluate the proposed Key Staff person’s experience in providing similar or relevant services to other organizations

through a satisfaction rating provided by the Key Staff person's previous project clients. The description of their projects must be detailed and comprehensive enough to permit the State to evaluate the work performed on the project meets the requirement(s).

Key Staff Reference Form must be completed in its entirety, and dated by a reference that performed a management, product owner, or supervisory role on the referenced project to be considered responsive. The Key Staff Reference Form must be returned to the Bidder for submission with proposal.

No information corrections or changes may be made on the reference form by the Bidder. Forms with alterations or changes to the entered information may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

References may be contacted to validate submitted responses based on customer satisfaction in accordance with [SECTION 6. EVALUATION](#). Failure to provide verifiable references may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

References must meet the following criteria:

- Must be from the company (customer) or Agency for which the project was developed and/or services provided.
- Must be someone who performs a management, product owner or supervisory role on the referenced project.
- Must be external to the Bidder's organization and corporate structure.
- Must not be from employees or individuals who have or are currently working for the Bidder.
- A contract and all amendments to it are considered as one project. Amendments to a contract cannot be submitted as separate projects.
- Must be able to provide an objective evaluation of the proposed Key Staff's performance.

If the reference is not allowed either legally or by company/organization policy to sign the reference form, the reference must type in its full name.

Prior to the proposed Key Staff person using a current State employee as a reference, the Bidder shall contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICERS](#), to ensure the current State employee is not a member of the Evaluation Team.

3.4. SOLUTION REQUIREMENTS

This section contains the detailed functional and non-functional requirements, deliverables and milestones requirements, and narrative response requirements pertaining to the proposed system that must be met in order to be considered responsive to this solicitation. In addition to meeting these requirements, the Bidder must adhere to ATTACHMENT 25: APPENDIX A - STATEMENT OF WORK.

3.4.1. FUNCTIONAL AND NON FUNCTIONAL REQUIREMENTS (M) (MO) (O)

The Bidder must complete and submit as part of its proposal, EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS. The Bidder must check one (1) of the boxes for each functional requirement showing whether the requirement will be met out-of-the-box, minor configuration/minor development, major configuration/major development or through customization (using code changes, toolset, integrations, or software component/add-on). The Bidder must indicate compliance and confirmation to each of the requirements by marking “Yes” or “No” in the column labeled “Met? Yes/No.” A blank or “NO” answer in this column may be considered non-responsive and may be the basis for rejecting the Bidder's proposal. The Bidder must indicate confirmation to each of the non-functional requirements by marking “Yes” or “No” in the column labeled “Met? Yes/No.”

Description of each column and the instructions for completing EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS are included in the Bidder Instructions sheet. The Bidder must not alter the structure or content of EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

Refer to [SECTION 6. EVALUATION](#) for details on how the requirements will be scored as part of the overall evaluation.

The State reserves the right to require a demonstration of any Solution Requirement the Bidder specifies will be met "Out of the Box."

3.4.2. DELIVERABLES AND MILESTONES TABLE (M)

The Bidder must complete and submit as part of its proposal, EXHIBIT B: DELIVERABLES TABLE. The Bidder must indicate compliance and confirmation to each of the deliverables by marking “Yes” or “No” in the column labeled “Bidder Agrees to Meet? Yes/No.” A blank or “NO” answer in this column may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The Bidder must not alter the structure or the content of EXHIBIT B: DELIVERABLES TABLE.

Refer to the details in [SECTION 6. EVALUATION](#) on how the requirements will be scored as part of the overall evaluation.

3.4.3. NARRATIVE REQUIREMENTS (MS)

The Bidder must complete and submit ATTACHMENT 17: NARRATIVE RESPONSE as part of their proposal, in accordance with the instructions and requirements specified in the Attachment.

Refer to [SECTION 6. EVALUATION](#) for details on how the requirements will be scored as part of the overall evaluation.

3.5. DEMONSTRATIONS (MS)

Demonstrations provide the State validation of the Bidder's ability to meet the requirements of this RFP. Demonstrations will be conducted at the sole discretion of the State and are intended to allow the State to further evaluate the Bidder's proposed solution. Compliant Bidders passing the administrative, qualification and solution requirements will be invited to demonstrate their proposed solution. The State will notify Bidders of the dates and times of their demonstrations no fewer than five (5) calendar days prior to the scheduled demonstrations.

A demonstration is defined as a live presentation of a software application's features, functionality, or capabilities. The purpose of demonstrations is to show how the solution functions, and how it meets the functional and non-functional requirements by demonstrating the functionality to meet the demonstration scripts in section ATTACHMENT 18: SOLUTION DEMONSTRATION and at the State request, a specific subset of the functional requirements which the bidder has stated can be met out of the box. The goal is to determine if the solution meets the State's overall needs.

3.5.1. CONDUCT OF DEMONSTRATION

The Bidder demonstrations must be conducted as follows:

1. The Bidder must host the Demonstration using a web conferencing tool such as WebEx, BlueJeans, MS Teams, Zoom, or a similar tool that provides for multiple participants and screen sharing.
 - a. No recording devices or transcription services of demonstrations are allowed.
2. The Bidder must transmit the Demonstration online meeting information by email to the Procurement Officers specified in [SECTION 2.2.1. PROCUREMENT OFFICERS](#) no fewer than three (3) calendar days prior to the demonstration date. The Procurement Officers will distribute the meeting information to the Evaluation Team.
3. The Bidder is fully responsible for all aspects of Bidder Demonstrations. Costs for developing and providing the demonstration are entirely the responsibility of the Bidder and shall not be reimbursed by the State.
4. The State reserves the right to reschedule or propose a new demonstration time(s) based on unforeseen circumstances.
5. Bidders must provide their own technical staff and equipment resources, as necessary, for the demonstrations.
6. Demonstrations must be a live, interactive presentation of the software solution, where the presenter engages with the software in real-time, rather than using static slides, images, or PowerPoint presentations.

3.5.2. FUNCTIONAL REQUIREMENTS DEMONSTRATION

The Functional Requirements Demonstration will consist of a demonstration where Bidder shall demonstrate features in the ATTACHMENT 18: SOLUTION DEMONSTRATION and at the state's request, a subset of functional requirements that will be met by the system "out of the box" as indicated by Bidder in EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS. Failure to demonstrate the "out of the box" functionality will result in Bidder disqualification.

Each Bidder will be allotted one (1) day for the Functional Requirements Demonstration. The Demonstration will consist of a morning presentation session, followed by an afternoon question-and-answer session. Demonstrations will be hosted by the Bidder, and the specific date and general schedule will be determined by the State. It is the Bidder's responsibility to determine how best to present its products and materials within the allotted session.

Demonstration of Requirements may be presented in any order, however, the demonstrator must clearly identify the requirement number to which the demonstration is related.

Refer to [SECTION 6. EVALUATION](#) for details on how the requirements will be scored as part of the overall evaluation.

4. COST

Cost is a primary evaluation criterion weighted at 40% of the total points.

This section contains the mandatory scored and mandatory optional cost requirements that must be met in order to be considered responsive to this solicitation. All proposed costs for all line items must be all-inclusive, thereby including the cost of any and all services required in this solicitation.

The intent is to structure the cost format in order to facilitate a straightforward comparison among all Bidders and foster competition to obtain the best cost. Therefore, the Bidder is advised that failure to comply with the instructions, such as submission of an incomplete proposal, use of alternative cost structures or different formats than the one required, may be the basis for rejection of the Bidder's proposal.

It is imperative that no cost information be included in the body of the proposal. Cost information must only be submitted in the Bidder's Volume 2, Cost in accordance with [SECTION 5. PROPOSAL/BID FORMAT AND SUBMISSION REQUIREMENTS](#).

4.1. COST WORKBOOK (MS)

The Bidder must submit a completed EXHIBIT C: COST WORKSHEETS separately in Volume 2, as part of their response, in accordance with the requirements specified in this [SECTION 5.3. DELIVERY OF](#)

SUBMITTALS

Services, features, equipment, and costs included in EXHIBIT C: COST WORKSHEETS are those that the Bidder must provide for the term of the Contract as identified in the ATTACHMENT 25: APPENDIX A - STATEMENT OF WORK, which includes all optional years.

4.2. COST WORKBOOK INSTRUCTIONS

The cost workbook includes multiple cost worksheets that must be completed by the Bidder and submitted with its Final Cost Proposal to be considered responsive. The cost workbook lists all cost elements required.

The Bidder is required to enter all cost data in the format prescribed by the cost workbook, even if there are no costs for the item indicated on the worksheet(s). In these instances the Bidder must indicate the cost as a zero (\$0). In addition, if any character other than a numeral is used (e.g., a dash), the State will assume the cost of the item to be zero (\$0). Items submitted with no price will be considered as offered at no cost. Costs cannot exceed two (2) decimal places.

The Bidder's completed Cost Workbook must be submitted separately with its proposal no later than the date and time identified in [SECTION 2.3. KEY ACTION DATES](#) to be considered responsive. The Cost Workbook shall list all cost elements required to implement, maintain, and operate the proposed services in support of the CSI.

See [SECTION 5.3. DELIVERY OF SUBMITTALS](#) for details surrounding the Cost Workbook submission.

Unless specified, all other fields must not be modified. If the cost workbook is modified or cells are left blank, the State may be considered non-responsive and may be the basis for rejecting the Bidder's proposal. The cost workbook must be filled out completely or the State may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The State has populated some of the cells with formulas, however it is the responsibility of the Bidder to ensure worksheets and calculations are correct and accurate. The State will not assume responsibility for any cost figures that do not calculate properly.

A detailed description of each worksheet is provided in the EXHIBIT C: COST WORKBOOK.

- Tab 1: Instructions, Workbook Instructions
- Tab 2: Cost Summary, Cost Workbook Summary
- Tab 3: Base Contract Deliverables, One-Time Project Services Costs (Base Agreement Term)
- Tab 4: Mandatory-Optional, Functional Mandatory-Optional Requirements
- Tab 5: Licensing Tools Hosting Costs, Third-Party Software Products, Licensing, Hosting including

Cloud, Data, Infrastructure, and Services Costs

- Tab 6: M&O Continuous Support, Maintenance and Operations Costs
- Tab 7: Staff Rate Sheet (UT), Unanticipated Tasks Hourly Labor Rates
- Tab 8: Continuous Enhancements, Improvements, Statutory and Regulatory Changes

Refer to the EXHIBIT C: COST WORKSHEETS for additional Cost Workbook instructions.

4.3. SALES TAX

Sales tax is not to be included in EXHIBIT C: COST WORKBOOK. If awarded the Contract, sales tax, if applicable, should be added at time of invoicing. The sales tax rate applied should be based on the rate of the area where the service is to be provided. See California Department of Tax and Fee Administration Regulation 1502 (f) (1) (D).

5. PROPOSAL/BID FORMAT AND SUBMISSION REQUIREMENTS

These instructions identify the mandatory proposal format and the approach for the development and presentation of proposals. The format instructions must be followed, all requirements and questions in the solicitation must be completed, and all requested data must be supplied. The Bidder shall carefully examine the solicitation and be satisfied with the compliance conditions prior to submittal.

Bidder shall upload an electronic copy of its proposal, including the Cost Workbook, as specified in [SECTION 5.4. PROPOSAL CONTENT AND STRUCTURE](#). It is important that Bidder's electronic files that comprise its proposal are clearly labeled, or they may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The State will not be liable for any costs incurred by any Bidder in responding to this solicitation, regardless of whether the State awards the Contract through this process, decides not to move forward with the project, cancels this solicitation for any reason, or Contracts for the project through other processes or by issuing another solicitation.

5.1. PREPARATION

Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this solicitation document. Expensive bindings, colored displays, promotional materials, etc., are not necessary or desired. Emphasis should be concentrated on conformance to the solicitation document instructions, responsiveness to the solicitation document requirements, and completeness and clarity of content.

5.2. COMPLETION OF PROPOSALS

Proposals must be complete in all respects as required. A proposal may be rejected if it is conditional, includes assumptions, includes exceptions that conflict with requirements or the intent of the effort, includes modifications to requirements, or if it contains any alterations of form or other irregularities of any kind. A proposal may be considered non-responsive and may be the basis for rejecting the Bidder's proposal if any such defect or irregularity from the solicitation document requirements. The proposal must contain all costs as required in [SECTION 4. COST](#) and [SECTION 5. PROPOSAL/BID FORMAT AND SUBMISSION REQUIREMENTS](#).

5.3. DELIVERY OF SUBMITTALS

The Bidder must email the Procurement Officer by the due date specified in [SECTION 2.3. KEY ACTION DATES](#) , no more than two (2) contacts who will have access to the State's file sharing site to electronically upload Bidder's proposal as stated in [SECTION 2.2.5. REQUEST INVITATION TO STATE'S FILE-SHARING SITE](#) . Once provided, an invitation to the State's file sharing site will be sent to those individuals. It is the Bidder's responsibility to confirm receipt of the invitation with the Procurement Officer.

A separate file location will be created for each Bidder accessible only to the Bidder Contact(s).

The file sharing site does not allow access from outside the Continental United States.

It is highly recommended that Bidders upload a test MS Word, MS Excel, and PDF file to each folder at least five (5) calendar days prior to the due date to test access to the State's file sharing site. Upon successful upload, notify the Procurement Officer and the test file will be deleted. It is the Bidder's responsibility to gain access to the file-sharing site to submit their proposal. Lack of planning on gaining access or submitting a test file to ensure there are no errors will not result in the State granting an extension of the response submission date.

The file sharing site will provide a primary folder for each Bidder to submit their proposal. Each Bidder's folder will contain subfolders: Volume 1, Volume 2.

The Bidder contacts will be required to upload a complete copy of the Bidder's proposal to the appropriate folders.

If a Bidder fails to request access to the file sharing site by the due date specified in the Key Action Dates, the State cannot guarantee access to the site prior to the proposal submittal due date and no other submissions outside of the file sharing site will be considered.

COST:

- The Bidder Contacts will be required to upload a complete copy of the Bidder's EXHIBIT C: COST WORKSHEETS in the appropriate cost folder.
- The Bidder's EXHIBIT C: COST WORKSHEETS file shall be titled with the [Bidder's Name] and Project Name - *EXHIBIT C: COST WORKSHEETS*, and deposited in the folder labeled "Volume 2".
- The Bidder's Cost Workbook shall be in MS Excel format (version 2019 or higher).
- Prior to submission, Bidders MUST apply an encryption password to the Cost Workbook.
- The Bidder will be required to email the encryption password to the Procurement Officer and Secondary Procurement Officer at the same time the Bidder uploads their cost workbook.

If a file is uploaded in error to a file sharing site folder, the Bidder may submit a request by email to the Procurement Officer prior to the last day to submit responses. **Do not upload compressed files (.zip files) onto the file sharing site.**

Proposals must be received no later than the date and time specified in [SECTION 2.3. KEY ACTION DATES](#) . Late receipt of a proposal may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

5.4. PROPOSAL CONTENT AND STRUCTURE

It is the Bidder's responsibility to ensure its proposal is submitted in a manner that enables the State to easily locate all response descriptions, Attachments, and Exhibits for each requirement of this solicitation. Page numbers should be in the same position throughout the proposal. Figures, tables, charts, etc., should be assigned index numbers and should be referenced by these numbers in the text and in the Table of Contents. Figures, tables, charts, etc., should be placed as close to text references as possible. The proposal should be organized to identify the Attachments/Exhibits.

1. Show the following on each page of the proposal:
 - a. Solicitation #
 - b. Name of Bidder
 - c. Attachment/Exhibit Number
 - d. Page number (Page # of ##)
2. Response components shall be submitted electronically using the Century Gothic typeface no smaller than twelve (12) points, with headers/footers and table/figures no smaller than ten (10) point font.
3. Documents must be formatted to fit, if printed, on 8.5" x 11" letter-size paper and have a perimeter margin no less than one-half inch (0.5").
4. Electronic copies of the proposal must be in Microsoft Office version 2019 or higher (e.g., MS Word, MS Excel, MS Visio, etc.). The Bidder must also include (1) searchable PDF version of its proposal; however, it must be identical in content and pagination.

5. PDF versions of documents shall be used for those submissions of the proposal that require signature.
6. The Bidder must ensure that no cost information of any type is included outside of the Cost Workbook. The inclusion of cost in any part of the proposal, except for Volume 2, may be the basis for rejection of the Bidder's proposal.
7. Bidders must ensure their proposal is submitted in the applicable file-sharing site folders.
8. As stated in [SECTION 2.4.5. CONFIDENTIALITY](#), proposals marked "confidential" or "proprietary" may exclude the Bidder from consideration for award.

5.4.1. VOLUME 1: RESPONSE TO ADMINISTRATIVE AND TECHNICAL REQUIREMENTS

Volume 1 submission must contain the following in this order:

Table of Contents

1. ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL
2. ATTACHMENT 2: INTENT TO BID
3. ATTACHMENT 3: FOLLOW-ON CONTRACT DISCLOSURE FORM
4. ATTACHMENT 4: COVER LETTER FORM
5. ATTACHMENT 5: RESPONSE TO ADMINISTRATIVE REQUIREMENTS
6. ATTACHMENT 6: CONFIDENTIALITY STATEMENT
7. ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105
8. ATTACHMENT 8: WORKERS' COMPENSATION CERTIFICATION
9. ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES
10. ATTACHMENT 10: DVBE DECLARATIONS (if applicable)
11. ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION
12. ATTACHMENT 12: TACPA PREFERENCE REQUEST FORMS (if applicable)
13. ATTACHMENT 14: BIDDER QUALIFICATIONS FORM
14. ATTACHMENT 15: BIDDER REFERENCE FORM
15. ATTACHMENT 16.1: Project Manager - QUALIFICATIONS FORM
16. ATTACHMENT 16.2: Project Manager - REFERENCE FORM
17. ATTACHMENT 16.3: Scrum Master - QUALIFICATIONS FORM
18. ATTACHMENT 16.4: Scrum Master - REFERENCE FORM
19. ATTACHMENT 16.5: Business Analyst Lead - QUALIFICATIONS FORM
20. ATTACHMENT 16.6: Business Analyst Lead - REFERENCE FORM
21. ATTACHMENT 16.7: Configuration Lead - QUALIFICATIONS FORM
22. ATTACHMENT 16.8: Configuration Lead - REFERENCE FORM
23. ATTACHMENT 16.9: Technical Architect Lead - QUALIFICATIONS FORM
24. ATTACHMENT 16.10: Technical Architect Lead - REFERENCE FORM

- 25. ATTACHMENT 17: NARRATIVE RESPONSE
- 26. ATTACHMENT 18: SOLUTION DEMONSTRATION
- 27. ATTACHMENT 19: CUSTOMER REFERENCE FOR PRODUCTIVE USE REQUIREMENTS
CERTIFICATION
- 28. EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS
- 29. EXHIBIT B: DELIVERABLES TABLE

5.4.2. VOLUME 2: COST

This volume must contain: EXHIBIT C: COST WORKSHEETS

6. EVALUATION

This section details the evaluation process and scoring procedures the State will follow when evaluating proposals submitted in response to this solicitation. The evaluation process is a multi-step review of each Bidder's proposal to determine that it is responsive, and provides a "value effective" solution to the State. The value effective proposal is the proposal that best meets all requirements set forth in this solicitation and any State negotiated items.

The State reserves the right to modify or cancel this procurement in its entirety or in part at any time.

6.1. EVALUATION TEAM

This procurement is being conducted under the guidance of a Procurement Official from CDT OSTP (refer to [SECTION 2.2.1. PROCUREMENT OFFICERS](#)). The Procurement Official will serve as the Bidder's point of contact for questions and clarification, and will identify the rules governing this procurement.

The State will establish an evaluation team consisting of DCC management and staff to review and evaluate proposals. The State Procurement Official will provide guidance to the evaluation team and provide oversight of the evaluation process. The State may engage additional qualified individuals or subject matter experts (SME) during the evaluation process to assist the State in gaining a better understanding of technical, financial, legal, contractual, or program issues. These other individuals do not have voting privileges or responsibility for the evaluation process and will serve solely in an advisory capacity.

6.2. PROPOSAL EVALUATION

This section identifies how the State will evaluate and award points for each proposal in a manner that preserves the integrity of the competitive procurement process.

Proposals will be based on compliance with all requirements, with points allocated sixty percent (60%) for

scored administrative, qualifications, narrative response and solution requirements. The remaining forty percent (40%) will be allocated for Cost. The evaluation methodology and distribution and allocation of maximum points possible for each proposal component is provided in Table 6.2: Evaluation Scoring and Point Distribution.

Proposals will be evaluated using a combination of mandatory Pass/Fail and numerically scored criteria. All Bidders should read this section carefully to understand how points and scores are assigned.

A proposal may be rejected if it is conditional or incomplete, contradicts the requirements, contains alterations of any form, or contains other irregularities of any kind, including alterations to any terms and conditions.

Evaluation scoring will be made by consensus of the Evaluation Team members.

There are 1,600 points available (960 non-cost points, and 640 cost points), excluding preferences and incentives. All point calculations will be rounded to the nearest hundredth (two (2) decimal places).

Table 6.2: Evaluation Scoring and Point Distribution

REQUIREMENT	SCORING ELEMENT	SCORING METHOD	MAX SCORE
NON-COST EVALUATION (max. 960 points)			
Administrative Requirements	Mandatory	Pass/Fail	N/A
Bidder Qualifications	Mandatory	Pass/Fail	N/A
Bidder Qualifications	Desirable	Scored	45.00
Bidder Reference	Mandatory	Pass/Fail	N/A
Bidder Reference	Mandatory	Scored	80.00
Bidder Narrative Response	Mandatory	Scored	335.00

Project Manager Qualifications	Mandatory	Pass/Fail	N/A
Project Manager Qualifications	Desirable	Scored	6.00
Scrum Master Qualifications	Mandatory	Pass/Fail	N/A
Scrum Master Qualifications	Desirable	Scored	16.00
Business Analyst Lead Qualifications	Mandatory	Pass/Fail	N/A
Business Analyst Lead Qualifications	Desirable	Scored	6.00
Configuration Lead	Mandatory	Pass/Fail	N/A
Configuration Lead Qualifications	Desirable	Scored	6.00
Technical Architect Lead	Mandatory	Pass/Fail	N/A
Technical Architect Lead Qualifications	Desirable	Scored	6.00
Key Staff Reference Forms (Maximum of 32 points per Key staff member)	Mandatory	Scored	160.00
Demonstrations	Mandatory	Pass/Fail and Scored	300.00
Deliverable and Milestone Table	Mandatory	Pass/Fail	N/A
Functional & Non-Functional Requirements	Mandatory	Pass/Fail	N/A

COST EVALUATION (max. 640 points)			
Cost Evaluation	Mandatory	Scored	640.00
MAXIMUM TOTAL POINTS AVAILABLE (WITHOUT PREFERENCE POINTS APPLIED)			

6.2.1. VALIDATION AGAINST REQUIREMENTS

The State will review each proposal in detail to determine its compliance with the solicitation requirements. The State reserves the right to use multiple means to validate and determine the Bidder's response to a requirement. This may be through details in its description and/or supporting documentation provided or material that is publicly available, that may either support or contradict the Bidder's claim of intended compliance.

During the Proposal evaluation, the State may request the Bidder clarify any area of the proposal that the State determines to be unclear in accordance with [SECTION 6. EVALUATION](#).

If a Bidder's proposal fails to meet a mandatory requirement, it will be considered a deviation in accordance with [SECTION 2.4.1. IDENTIFICATION AND CLASSIFICATION OF SOLICITATION REQUIREMENTS](#).

6.2.2. ERRORS IN THE FINAL PROPOSAL

An error in the proposal may cause the rejection of that proposal; however, the State may at its sole option retain the proposal and make certain corrections. In determining if a correction will be made, the State will consider the conformance of the proposal to the format and content required by the solicitation, and any unusual complexity of the format and content required by the solicitation. If appropriate, errors may be corrected in accordance with the following:

1. If the Bidder's intent is clearly established based on review of the complete proposal submittal, the State may at its sole option correct an error based on that established intent.
2. If the State discovers obvious clerical or arithmetic errors, the State may, at its sole option, correct such errors. If the mathematical correction results in significant changes to the Bidder's response, the State will provide the Bidder the opportunity to validate the resulting correction.
3. It is essential that Bidders carefully review the cost elements in their proposals since they may not be provided the opportunity to correct errors after submission.

4. In the event an ambiguity or discrepancy between any of the State's solicitation documents, is detected after review of the bids, the State reserves the right to seek clarification and acceptance from the Bidder.
5. The Bidder is required to thoroughly review the solicitation to ensure that its proposal is fully responsive with the solicitation requirements and thereby avoid the possibility of being ruled non-responsive. It is the Bidder's responsibility to utilize the question and answer process to clarify any ambiguities in the solicitation requirements to ensure that the Bidder is submitting a responsive proposal.
6. At the State's sole discretion, it may declare all proposals to be Draft Proposals. Bidders may not protest the State's determination of all Proposals being declared Draft Proposals. If all proposals are declared to be Draft Proposals, the State may issue an addendum to this solicitation. Should this occur, confidential discussions may be held with Bidders that wish to remain under consideration. Each Bidder will be notified of the due date for the submission of a new Proposal to the State. This submission must conform to the requirements of the original RFP or as modified by an addendum. The new proposals will be evaluated as required by [SECTION 6. EVALUATION](#).

6.2.2.1. BIDDER RESPONSE CLARIFICATION

The State may request that a Bidder clarify any area of their response that the State determines to be unclear. The State may also request clarification for areas that may render the proposal non-responsive to the requirements and provide Bidders the opportunity to resubmit a responsive proposal by the date and time specified by the State. However, if the Bidder does not resubmit a responsive proposal to the areas identified by the date and time specified by the State, the Bidder's proposal will be rendered non-responsive, and ineligible to proceed to the next phase of the solicitation process. Clarifications may be requested via writing or confidential discussion.

6.3. ADMINISTRATIVE EVALUATION

All [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#) labeled with (M) are mandatory, whereas Administrative Requirements labeled with (O) are optional. Bidders are not required to respond to optional requirements. Review of the proposals will begin with ensuring that the Bidder has responded to all mandatory Administrative Requirements. Unless otherwise required, e-Signatures or copies of an original signature are acceptable.

Administrative Requirements will be evaluated as a Pass/Fail. If a Proposal fails to meet any mandatory requirement specified in [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#), it may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.4. QUALIFICATION EVALUATION

All [SECTION 3.3. QUALIFICATION REQUIREMENTS](#) labeled with (M) and (MS) are mandatory, whereas

Qualification Requirements labeled with (DS) are optional. Bidders are not required to respond to optional requirements. Review of the proposals will begin with ensuring that the Bidder has responded to all mandatory Qualification Requirements.

Qualification Requirements will be evaluated as a Pass/Fail and, if applicable, points will be awarded. If a proposal fails to meet any mandatory requirement specified in [SECTION 3.3. QUALIFICATION REQUIREMENTS](#), it may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.4.1. BIDDER QUALIFICATIONS EVALUATION

The State will evaluate Bidder qualifications using the information contained in the completed ATTACHMENT 14: BIDDER QUALIFICATIONS FORM. Descriptions of experience must be clear, concise, and apply directly to the requirements.

To aid the State in evaluating Bidder qualifications, the Bidder should use a MM/DD/YYYY format when indicating project start and end dates. If a Bidder submits a proposal using any other date format, the State will count only the whole months or years between the start and end dates specified. For example, Bidder "A" cites start and end dates for a project as 01/19/2023 and 07/25/2024. The Bidder or Key Staff member would only be credited with eighteen (18) months of experience.

If a project end date is ongoing or exceeds the proposal due date, then the Bidder will receive credit for only the experience acquired up to the proposal due date specified in [SECTION 2.3. KEY ACTION DATES](#). In this instance, Bidders are instructed to use the proposal due date as the end date of ongoing projects. Concurrent project timeframes (overlapping dates) will only count once for calculating the number of years and months of qualification experience.

If the number of years and months for a project was not indicated on the Bidder Qualification form "Experience gained on this cited Project" and the Bidder checked "yes" to meeting the total experience on the project cited, then the Bidder will only receive experience credit for the minimum number of years required for that requirement **OR** will receive the number of years indicated on the start/end date of the Bidder Qualification form, whichever is less.

Bidders that do not complete and submit all required Bidder qualification forms with their proposal may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.4.2. BIDDER REFERENCES EVALUATION

The State will evaluate the Bidder's references using the information provided in each ATTACHMENT 15: BIDDER REFERENCE FORM.

Bidders that do not return the required reference forms may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

Reference scores will be calculated by totaling the Satisfaction Ratings from each reference form submitted. The aggregate rating for all reference forms submitted will be divided by the number of reference forms submitted to determine the Bidder average rating score. This figure will then be multiplied by the total maximum points available (200) and divided by the maximum points possible per reference form (80). This figure will be rounded to the nearest whole number to determine the Bidder's final evaluated total score for Bidder references. For example, if three (3) references are submitted with total rating scores of 30, 50, and 80 from three (3) projects, the aggregate rating scores equal 160. The aggregate score 160 will be divided by the number of reference forms submitted (3) to determine the final rating of 53.33 points. $53.33 \text{ (average rating)} \times 200 \text{ (total points possible)} / 80 = 133.00 \text{ (rounded) total points for Bidder references.}$

If the State wishes to validate the claimed information and experience listed on a Bidder Reference Form, the State will make two (2) attempts via email or phone to the reference contact identified on the Bidder Reference Form. The Bidder should ensure that its Bidder Reference Form contacts are available for validation during the evaluation period identified in [SECTION 2.3. KEY ACTION DATES](#).

If the State has not received a response from the reference contact after the first contact attempt, a second attempt will be made. If no response is received after the second contact attempt, the State will seek assistance from the Bidder requesting the reference to respond to the State within forty-eight (48) hours of the second contact attempt.

If the State remains unable to contact the reference, the Bidder's proposal may be considered non-responsive and may be the basis for rejecting the Bidder's proposal for failure to provide a verifiable reference.

6.4.3. KEY STAFF QUALIFICATIONS EVALUATION

The State will evaluate Key Staff Qualifications and experience using the information contained in the Bidder's Key Staff qualification forms.

To aid the State in evaluating Key Staff qualifications, the Bidder should use a MM/DD/YYYY format when indicating project start and end dates on the Key Staff Qualification forms. If a Bidder submits a response using any other date format, the State will count only the whole months or years between the start and end dates specified.

If a project end date is ongoing or exceeds the proposal due date, then the Key Staff member will receive credit for only the experience acquired up to the proposal due date, as shown on [SECTION 2.3. KEY ACTION DATES](#).

Concurrent project timeframes (overlapping dates) will only count once for calculating the number of years and months of qualification experience for Key Staff.

Bidders that fail to submit a completed Key Staff Qualification form together with all required completed corresponding Key Staff reference forms may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

For each Key Staff, the Evaluation Team will first evaluate the completed ATTACHMENT 16: KEY STAFF QUALIFICATIONS FORM – INSTRUCTIONS for compliance with the instructions specified in the form and in [SECTION 3.3.3. KEY STAFF QUALIFICATIONS \(M\) \(DS\)](#). The State will evaluate Key Staff experience and award points as applicable using the Bidder's response to the mandatory and desirable requirements.

If the State is unable to validate that the information supplied qualifies for any desirable scored experience points, no points will be awarded for such experience.

6.4.4. KEY STAFF REFERENCES EVALUATION

The Bidder must complete and submit one (1) Key Staff Reference form using the applicable Attachment for each Key Staff project cited in the Key Staff Qualification Forms.

Each Key Staff reference form must be from a reference contact who performed a management, supervisory, or product owner role on the cited project.

All Key Staff Reference Forms must be returned with the proposal response. Proposals that do not include the required Key Staff reference forms may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The Evaluation Team will validate claimed Key Staff experience specified in the Key Staff Qualification Forms using the corresponding Key Staff Reference Form for each project cited to meet the mandatory (M) experience and if applicable, Desirable Scored (DS) experience. If the State is unable to validate the claimed experience meets the (M) requirement, the response may be considered non-responsive and may be the basis for rejecting the Bidder's proposal. If the State is unable to validate the claimed experience meets the Desirable Scored (DS) experience, points will not be awarded.

References will be scored based upon the ratings provided by the reference(s). Any conflicting information may result in the offer being deemed non-responsive.

Reference scores will be calculated by totaling the Satisfaction Ratings from each reference form submitted. The aggregate rating for all reference forms submitted will be divided by the number of reference forms submitted to determine the Key Staff's average rating score. This figure will then be

multiplied by the total maximum points available (100) and divided by the maximum points possible per reference form (80). This figure will be rounded to the nearest whole number to determine the Bidder's final evaluated total score for Key Staff references. For example, if three (3) references are submitted with total rating scores of 30, 50, and 80 from three (3) projects, the aggregate rating scores equal 160. The aggregate score (160) will be divided by the number of reference forms submitted (3) to determine the average rating of 53.33 points. $53.33 \text{ (average rating)} \times 100 \text{ (total points possible)} / 80 = 67.00 \text{ (rounded)}$ total points for Key Staff references.

If the State validates a Key Staff qualification, the State will make two (2) attempts to the reference contact identified on the Key Staff Reference Form to validate the claimed information and experience. The Bidder should ensure that its Reference Form contacts are available for validation during the evaluation period identified in [SECTION 2.3. KEY ACTION DATES](#). Reference Contacts listed on the Reference Forms must be the same contact person listed on each Bidder Qualification Form.

If the State has not received a response from the reference contact after the first contact attempt, a second attempt will be made. If no response is received after the second contact attempt, the State will seek assistance from the Bidder requesting the reference to respond to the State within forty-eight (48) hours of the second contact attempt.

If the State remains unable to contact the reference, the Bidder's proposal may be considered non-responsive and may be the basis for rejecting the Bidder's proposal for failure to provide a verifiable reference.

6.5. SOLUTION REQUIREMENTS EVALUATION

All [SECTION 3.4. SOLUTION REQUIREMENTS](#) labeled with (M), (MS) and (MO) are mandatory, whereas Solution Requirements labeled with (O) are optional. Bidders are not required to respond to optional requirements. Review of the proposals will begin with ensuring that the Bidder has responded to all mandatory Solution Requirements.

Solution Requirements will be evaluated as a Pass/Fail and, if applicable, points will be awarded. If a proposal fails to meet any mandatory requirement specified in [SECTION 3.4. SOLUTION REQUIREMENTS](#), it may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.5.1. FUNCTIONAL AND NON-FUNCTIONAL EVALUATION

The functional and non-functional requirements identified in EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS consist of Mandatory (M), Mandatory-Optional (MO), and Optional (O) requirements. The Bidder must provide complete responses to each (M) and (MO) requirements.

The State will evaluate each functional and non-functional requirement, to determine whether the response fully addresses the requirements in accordance with the following criteria:

Instructions on how to respond to functional and non-functional requirements can be found in the instructions tab of the EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS

Failure to indicate how the solution will be met (Columns J, K, L, M) and if the solution will meet the requirement (Column I) may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The Bidder must not modify the format, add columns or include explanatory text to its response or otherwise change the format or content of EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

The following identifies each column within the EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS. Bidder instructions on how to respond can be found in the Bidder Instructions Tab of the EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

- Column A: Requirement Category
- Column B: Requirement Number
- Column C: Main Business Capability/Function
- Column D: Sub Business Capability/Function
- Column E: Business Process
- Column F: Requirement Description
- Column G: Priority
- Column H: Classification
- Column I: Met? (Y/N)?
- Column J: Out of the Box
- Column K: Minor Configuration (20 hours or less)
- Column L: Major Configuration (21 - 39 Hours) or Third Party Tools
- Column M: Customization (More than 40 Hours)

The state reserves the right to require a demonstration of any Solution Requirement the Bidder specifies will be met "Out of the Box."

6.5.2. DELIVERABLES EVALUATION

The State will evaluate the EXHIBIT B: DELIVERABLES TABLE, which lists deliverables. A "Yes" response in the "Yes/No" column indicates the Bidder agrees to produce and meet each deliverable and milestone identified therein. The Evaluation Team will evaluate the Bidder's responses to confirm compliance.

A “No” response to any of the Mandatory or Mandatory Optional items may be considered non-responsive and may be the basis for rejecting the Bidder’s proposal.

The Bidder must not modify the format, add columns, or include explanatory text to its response or otherwise change the content of EXHIBIT B: DELIVERABLES TABLE.

6.5.3. NARRATIVE RESPONSE(S) EVALUATION

The State will evaluate the narrative responses using the information contained in the completed ATTACHMENT 17: NARRATIVE RESPONSE.

Points will be awarded for the narrative responses as detailed in Table 6.5.3-1: Narrative Scoring Criteria. Points will be awarded based on percentages of the total possible points for each Narrative Requirement.

Table 6.5.3-1: Narrative Scoring Criteria

SCORING CRITERIA	RATING	PERCENTAGE OF POINTS POSSIBLE
<ul style="list-style-type: none">The response fully meets the Narrative evaluation factor.The Bidder has demonstrated a full understanding of the required Narrative and has provided a complete approach to meeting the Narrative requirements.	Fully Meets	100%
<ul style="list-style-type: none">The response mostly addresses the Narrative requirements.The Bidder has demonstrated more than partial, but less than full understanding. The omission(s), flaw(s), or defect(s), if any, are inconsequential.	Mostly Meets	75%
<ul style="list-style-type: none">The response partially addresses the Narrative requirements.The Bidder has demonstrated only a partial understanding, but less than full understanding, of the Narrative requirement. The omission(s), flaw(s), or defect(s), if any, are inconsequential.	Partially Meets	50%

<ul style="list-style-type: none"> The response minimally meets the Narrative requirements. The Bidder has demonstrated less than partial understanding of the Narrative requirements. The omission(s), flaw(s), or defect(s), if any, are consequential, where Evaluation Team cannot deduce an overall competency. 	Minimally Meets	25%
<ul style="list-style-type: none"> The response fails to address the Narrative requirements. The Bidder has either not included a response to the requirement or demonstrates a lack of understanding of the Narrative requirements. The omission(s), flaw(s), or defect(s) are significant. Includes exceptions and/or conditions. OR Conflicts with a mandatory requirement. 	Does Not Meet	0%

Any Narrative response receiving zero (0) points will not result in the proposal being deemed non-responsive.

6.6. SOLUTION DEMONSTRATIONS EVALUATION

The State will observe and evaluate each demonstration to assess the effectiveness and outcomes of each demonstration. Demonstrations will be evaluated using the criteria specified in **Table 6.6 A: Demonstration Evaluation Criteria** and **Table 6.6B Demonstration Scoring Key**. The maximum number of points available for demonstrations is 300 points as specified in **Table 6.6 C: Scoring and point distribution**.

The demonstrations for the first ten (10) requirements, which include user stories and expected results as identified in ATTACHMENT 18: SOLUTION DEMONSTRATION will be evaluated in accordance with these tables.

Table 6.6A: Demonstration Evaluation Criteria

Evaluation Criteria	Evaluation Criteria Description	Total Points
1. Ease of Use	Does the demonstration show solution components that are user-friendly? This includes, but is not limited to, an intuitive structure,	100

	consistent layouts, clear navigation across screens, tabbing from field to field, simple language for enhanced usability, prevention and recovery from user errors.	
2. Workflow Automation	Does the demonstration show workflow automation in the solution that reduces processing time and activities? This includes providing an overview of the end-to-end case management lifecycle for licensing and compliance, and/or demonstrating configurable rules, logic, and automated actions that minimize human input, streamline decision-making, and route cases appropriately, while supporting exceptions that require staff intervention.	100
3. Expected Result	Assesses the degree to which the defined expected results are achieved, based on the number of results met out of four (4) and scored according to the established evaluation thresholds.	100

Table 6.6B: Demonstration Scoring Key Table

Rating	Description	Points %
Fully Meets	<p>Ease of Use and Workflow Automation Evaluation Criteria: The demonstration element fully meets the expectations of the Evaluation Team. The Bidder has demonstrated a complete understanding of the requirement(s) and has provided a complete approach to meeting the requirement(s).</p> <p>Expected Results Evaluation Criteria: All four results met</p>	100
Mostly Meets	<p>Ease of Use and Workflow Automation Evaluation Criteria: The demonstrated element mostly addresses the evaluation factor. The Bidder has demonstrated more than partial, but less than full understanding of the requirement(s). The omission(s), flaw(s), or defect(s), if any, are inconsequential.</p> <p>Expected Results Evaluation Criteria: Three of the four results met</p>	75
Partially Meets	<p>Ease of Use and Workflow Automation Evaluation Criteria: The demonstrated element partially addresses the evaluation factor. The Bidder has demonstrated a partial understanding of the requirement(s).</p>	50

Rating	Description	Points %
	The omission(s), flaw(s), or defect(s), if any, are inconsequential. Expected Results Evaluation Criteria: Two of the four results met	
Minimally Meets	Ease of Use and Workflow Automation Evaluation Criteria: The demonstrated element minimally addresses evaluation factor. The Bidder has demonstrated a minimal understanding of the requirement(s). The omission(s), flaw(s), or defect(s) are consequential. Expected Results Evaluation Criteria: One of the four results met	25
Does Not Meet	Ease of Use and Workflow Automation Evaluation Criteria: The Bidder has demonstrated no understanding of the evaluation factor. The omission(s), flaw(s), or defect(s), result in the Evaluation Team being unable to deduce an overall competency. Expected Results Evaluation Criteria: None of the results met	0

Table 6.6C: Scoring and Point Distribution

Ease of Use	100 points
Workflow Automation	100 points
Expected Result	100 points
Requirement 11 through 15	Pass/Fail
Total points:	300 points

If the Bidder's response indicates that a requirement will be met "out of the box", as defined in the instructions included with [EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#), such functionality must be demonstrated.

ATTACHMENT 18: SOLUTION DEMONSTRATION requirement 11 through 15 consist of select DCC demonstrations from the bidder's responses for requirements that are identified as Met which can be met "out of the box".

These demonstrations will be evaluated on a Pass/Fail basis and will not receive additional points.Failure

to demonstrate the identified "out of the box" functionality for requirements 11 through 15 will result in the Bidder's disqualification.

6.7. COST EVALUATION

After [SECTION 3. PROPOSAL REQUIREMENTS](#) have been evaluated, the evaluation team will evaluate the cost workbook (Bidder's response to Volume 2) for those Bidders whose proposals have been deemed responsive. If a Bidder is determined non-responsive, its cost workbook will remain unopened.

If a Bidder's cost workbook fails to meet the password protection requirement, the State may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The Total Cost points are weighted at forty percent (40%) of the maximum available points for this solicitation.

All proposed costs for all line items must be all-inclusive, thereby including the cost of any and all associated services and deliverables required in this solicitation to implement and maintain the full solution through the term of the Agreement.

The intent is to structure the pricing format to facilitate a straightforward comparison among all Cost submissions and foster competition to obtain the best market pricing. Consequently, DCC requires that each Bidder's cost information be in the format identified in EXHIBIT C: COST WORKSHEETS. Bidders are advised that failure to comply with the instructions listed, such as submission of incomplete proposals or use of alternative pricing structures or different formats than the one requested, may result in the rejection of Bidder's proposal.

Any elements not specifically priced or identified in the Bidder's Cost Workbook, or those that are identified after Contract Award as necessary to meet the requirements of this solicitation, will be at no additional cost to the State.

NOTE: It is imperative that no cost information be included anywhere outside of EXHIBIT C: COST WORKSHEETS may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.7.1. COST SCORE CALCULATION

All cost worksheets will be validated to verify completeness and mathematical accuracy. If appropriate, errors will be corrected in accordance with [SECTION 6.2.2. ERRORS IN THE FINAL PROPOSAL](#). After costs have been verified for accuracy, the Bidder with the lowest proposed Total Cost will receive the maximum score of two thousand nine hundred (2,900) points. All other Bidders will receive a

proportionally lower score using the ratio of the lowest proposed Total Cost to the Bidder's proposed Total Cost applied to the maximum of 2,900 points, as shown in Table 6.7.1A below:

Table 6.7.1A: Bidder Total Cost Score Formula

(Lowest proposed Total Cost)	X 2,900 points = Bidder Total Cost score
(Bidder's proposed Total Cost)	

The total evaluated cost score calculation example in Table 6.7.1B, Bidder Total Cost Score Calculation illustrates that Bidder C proposed the lowest Total Cost and received the maximum points possible.

Table 6.7.1B: Bidder Total Cost Score Calculation

BIDDER	BIDDER'S TOTAL COST	CALCULATION				BIDDER'S TOTAL COST SCORE
A	\$500,000	(\$300,000 / \$500,000)	X	2,900 points	=	1,740 points
B	\$400,000	(\$300,000 / \$400,000)	X	2,900 points	=	2,175 points
C	\$300,000	(\$300,000 / \$300,000)	X	2,900 points	=	2,900 points

NOTE: Point values in this example explain the calculations and have no other significance.

6.8. SOCIOECONOMIC PROGRAMS

Bidders who claim preference points will be evaluated to determine whether they submitted the required forms, documents, exhibits, and/or the responses necessary to validate their qualification and eligibility for the claimed preference(s). If the State determines that the submitted information is insufficient or that the required documents do not otherwise validate the eligibility for points in any of the claimed programs, then the points for that program will not be added to the Bidder's final overall proposal score. If the State is able to validate the Bidder's claim, the qualified preference points will be applied to the Bidder's final overall proposal score as illustrated in Table 6.8-1 Final Score and Rank Determination provided that the Bidder's proposal is not otherwise determined to be non-responsive to any mandatory requirements.

The total proposal score calculation is shown in Table 6.8-1, Example of Bidder Total Proposal Score Calculation.

Table 6.8-1: Bidder Total Proposal Score Calculation

BIDDER	BIDDER'S TOTAL NON- COST SCORE		BIDDER'S TOTAL COST SCORE		BIDDER'S TOTAL PROPOSAL SCORE
A	2,200.00 points	+	1,740.00 points	=	3,940.00 points
B	2,750.00 points	+	2,175.00 points	=	4,925.00 points
C	2,900.00 points	+	2,900.00 points	=	5,800.00 points

NOTE: Point values in this example explain the calculations and have no other significance.

6.8.1. DVBE INCENTIVE EVALUATION

In accordance with §999.5(a) of the Military and Veterans Code, for evaluation purposes only, the State shall provide an incentive to Bidders who provide California-certified DVBE participation that exceeds the mandatory California-certified DVBE participation goal in the amounts shown in Table 6.8.1-1 DVBE Participation Incentive Formula.

The State will verify DVBE and apply the incentive accordingly. The DVBE Incentive points are a percentage of the total possible points. The maximum incentive for this procurement is five percent (5%) of the total points available, and is based on the amount of DVBE participation confirmed. Table 6.8.1-1 below is an illustration of this calculation:

Table 6.8.1-1: DVBE Incentive Formula

CONFIRMED DVBE PARTICIPATION	DVBE INCENTIVE PERCENTAGE	DVBE INCENTIVE POINTS
≥ 5%	5%	290.00 (5,800 x .05)
4% - 4.99%	4%	232.00 (5,800 x .04)
3.% - 3.99%	3%	174.00 (5,800 x .03)
<3%	0%	0.00

NOTE: Bidder's final score calculation in Table 6.10-1 is an example that explains the calculations and has no other significance.

6.8.2. SMALL BUSINESS PREFERENCE EVALUATION

The State will verify Small Business/Non-Small Business preference claim and apply the five percent (5%) preference accordingly. Refer to [SECTION 3.2.13.3. SMALL BUSINESS PREFERENCE \(O\)](#) and [SECTION 3.2.13.4. NON-SMALL BUSINESS SUBCONTRACTOR PREFERENCE \(O\)](#) for more information.

In accordance with Government Code §14835 et seq., Bidders who qualify as a small business will be given a five percent (5%) preference for evaluation purposes only. The five percent (5%) preference is calculated on the total number of points awarded to the highest scoring non-small business that is responsive to the proposal requirements. The rules and regulations of this law, including the definition of a small business for the delivery of goods and services, are contained in the California Code of Regulations, Title 2, § 1896 et seq.

This five percent (5%) small business preference is also available to a non-small business claiming 25% California certified small business subcontractor participation. The five percent (5%) preference is calculated on the total number of points awarded to the highest scoring non-small business that is responsive to the proposal requirements and that is not subcontracting a minimum of 25% to a small business. Non-small business Bidders claiming the five percent (5%) small business preference must commit to subcontract at least 25% of the net proposal price with one (1) or more California certified small businesses.

Completed certification applications and required support documents must be submitted to the Department of General Services Office of Small Business and DVBE Services (OSDS) no later than 5:00 p.m. on the proposal due date, and the OSDS must be able to approve the application as submitted. Questions regarding certification should be directed to the OSDS at (916) 375-4940.

For an illustration of this process, refer to the example in Table 6.8.2-1, Small Business Preference Points Calculation. Points in this example explain the calculations and have no other significance.

The preference points for Bidders A and B are based on five percent (5%) of the Bidder proposal score of Bidder C, the highest scorer of a non-small business, which is $(5,800.00 \text{ points}) \times (.05) = 290.00 \text{ points}$ (rounded). Bidder C, which is neither a small business nor a non-small business subcontracting a minimum of 25 percent (25%) to a small business, receives no small business preference points.

Table 6.8.2-1: Small Business Preference Points Calculation

BIDDER	BIDDER TOTAL PROPOSAL SCORE	SMALL BUSINESS PREFERENCE CLAIM?	NON-SMALL BUSINESS PREFERENCE CLAIM?	SMALL BUSINESS PREFERENCE POINTS AWARDED
A	3,940.00 points	Yes	No	290.00 points
B	4,925.00 points	No	Yes	290.00 points
C	5,800.00 points	No	No	0.00 points

NOTE: Calculation is based on 5% of the Bidder with the highest “Bidder proposal score” that is a non-small business. In the example Table 6.8.2-1, Bidder C has the highest non-small business score.

6.8.3. TACPA PREFERENCE EVALUATION

The State will give preferences in accordance with the Government Code § 4530-4535.3, for Bidders that are California home based and qualify for claimed preferences under the Target Area Contract Preference Act (TACPA) by completing and returning the appropriate forms described in the solicitation. Where multiple preferences are claimed, the State will verify eligibility for the preferences and evaluate and apply preferences in accordance with the law.

Available evaluation preferences under TACPA are limited to nine percent (9%), five percent (5%) worksite, and one percent (1%) up to four percent (4%) workforce of the lowest total proposal price or fifty thousand dollars (\$50,000.00), whichever is less. The TACPA preference is a dollar preference, applied against the Bidder’s proposed cost, before cost is evaluated and converted to points.

The State will verify and apply TACPA preference accordingly. The TACPA preference does not apply when the worksite is fixed by the terms of the Contract.

6.9. BIDDER FINAL SCORE CALCULATION

The evaluation team will calculate the Bidder’s final score. Table 6.9-1, Bidder Final Score Calculation, illustrates the Bidder’s final score that incorporates both preference and incentive points:

Table 6.9-1: Bidder Final Score Calculation

BIDDER	BIDDER TOTAL	SMALL BUSINESS	VERIFIED	DVBE INCENTIVE	BIDDER
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R	PROPOSAL SCORE	PREFERENCE POINTS AWARDED	DVBE %	POINTS AWARDED	FINAL SCORE
A	3,940.00 points	290.00 points	3%	174.00 points	4,230.00 points
B	4,925.00 points	290.00 points	4%	232.00 points	5,215.00 points
C	5,800.00 points	0.00 points	5%	290.00 points	6,090.00 points

NOTE: Bidder's final score calculation in Table 6.9-1 is an example that explains the calculations and has no other significance.

6.10. PROPOSAL RANK DETERMINATION

The State will determine which Bidder has the highest combined score for the bid requirements and cost, up to the maximum points, plus any preference and/or incentive points. The State will rank all qualified proposals by the Bidder's final score. Table 6.10-1 demonstrates how the final ranking determination is made:

Table 6.10-1: Example of Final Score and Rank Determination

REQUIREMENT	MAX SCORE	BIDDER A	BIDDER B	BIDDER C
Administrative Requirements	Pass/Fail	Pass	Pass	Pass
Bidder Qualifications - Mandatory	Pass/Fail	Pass	Pass	Pass
Bidder Qualifications - Desirable	300.00	200.00	300.00	300.00
Bidder Reference	Pass/Fail	Pass	Pass	Pass
Bidder Reference	200.00	200.00	200.00	200.00
Bidder Narrative	800.00	800.00	800.00	800.00

Requirements for Seven (7) Proposed Key Staff - Mandatory	Pass/Fail	Pass	Pass	Pass
Requirements for Proposed Key Staff - Desirable	700.00	500.00	700.00	700.00
Key Staff Reference Forms	100.00	100.00	100.00	100.00
Interviews	300.00	100.00	250.00	300.00
Demonstrations	500.00	300.00	400.00	500.00
Deliverables Table	Pass/Fail	Pass	Pass	Pass
Functional & Non-Functional Requirements	Pass/Fail	Pass	Pass	Pass
Total Non-Cost Score	2,900.00	2,200.00	2,750.00	2,900.00
Total Cost Score	2,900.00	1,740.00	2,175.00	2,900.00
TOTAL PROPOSAL SCORE	5,800.00	3,940.00	4,925.00	5,800.00
Initial Rank (Before preferences and incentives)		3	2	1
DVBE Participation claimed	Yes/No; %	3%	4%	5%
DVBE Incentive Points	290.00	174.00	232.00	290.00
Small Business claimed	Yes/No	Yes	No	No
Small Business Preference Points	290.00	0.00	0.00	0.00
Non-Small Business Claimed	Yes/No	No	Yes	No
Non-Small Business Preference	290.00	0.00	290.00	No

Points				
BIDDER FINAL SCORE	6,670.00	4,114.00	5,447.00	6,090.00
FINAL RANK		3	2	1

NOTE: Bidder's final score calculation in Table 6.10-1 is an example that explains the calculations and has no other significance.

7. NEGOTIATIONS

This solicitation is being conducted under the authority of CDT pursuant to Public Contract Code (PCC) §6611, which provides the authority to use a competitive negotiation process when the State's business needs or the purpose of a procurement or contract is known, but negotiation is necessary to ensure the State receives the best value or the most cost-efficient goods, services, information technology, and telecommunications technology.

Negotiations allow the State and Bidder an opportunity to discuss items that could, in the State's opinion, enhance the Bidder's proposal and potential for award. Negotiations are not intended to allow a Bidder to completely rewrite its proposal. The negotiations are exchanges between the State and the Bidder, which are undertaken with the intent of allowing the Bidder to revise its proposal only in areas determined by the State during the negotiation process. Negotiations will be conducted either orally or in writing.

The State may discuss any aspect of the Bidder's proposal that could, in the opinion of the State, be altered or explained to enhance the proposal's potential for award. However, the State is not required to discuss every area where the Bidder's proposal could be improved. The scope and extent of negotiation exchanges are the matter of the State's judgment. The State reserves the right to modify or cancel this Solicitation in its entirety or in part at any time.

At the State's discretion, the State will determine the topics for negotiation and reserves the right to revise the scoring criteria for Best and Final Offer evaluation to obtain a value effective solution.

Award of a contract, if made, will be to the Bidder that meets and/or exceeds the State's requirements and provides the best value to the State. All aspects of the Bidder's proposal are confidential until after the issuance of the notification of award.

7.1. PROCEEDING TO NEGOTIATIONS

At the discretion of the State, the State may invite Bidder(s) to participate in the negotiation process under the following option.

Option 1

At the discretion of the State, the highest scoring responsive Bidder will be determined eligible to participate in the negotiation process. If the State cannot come to an agreement with the highest scoring responsive Bidder, the State will invite and proceed with negotiations with the next highest scoring responsive Bidder. This Bidder negotiation selection process will continue until the State completes negotiations with the final selected Bidder.

Option 2

At the discretion of the State, up to the top three (3) highest scoring, responsive Bidders will be determined eligible to participate in the negotiation process.

NOTE: In the event no responsive bids are received, the State at its discretion may proceed to negotiations with all Bidders that submitted a bid.

The negotiations may or may not result in a Contract award.

7.2. NEGOTIATION INVITATION

Bidder(s) invited to participate in negotiations will receive an Invitation to Negotiate with the following information:

1. That the State is initiating negotiations pursuant to Public Contract Code 6611(a);
2. The general purpose and scope of the negotiations;
3. The anticipated schedule for the negotiations;
4. The procedures to be followed for negotiations; and
5. Confirmation of negotiation attendance within two (2) working days of invitation.

The Bidder(s) must submit any additional information requested by the State by the due date specified in the Invitation to Negotiate letter.

7.3. BEST AND FINAL OFFER SUBMISSION (BAFO)

At the conclusion of negotiations, the State may request a best and final offer (BAFO) submission. The intent of the BAFO is to clarify and document understandings reached during negotiations. The State will include a date and time for submission of the BAFO. A Bidder's BAFO is an irrevocable offer for one hundred and eighty (180) calendar days following the Contract Award date specified in [SECTION 2.3. KEY ACTION DATES](#) . A Bidder may extend the offer in the event of a delay in the Contract Award.

7.4. EVALUATION OF BAFO SUBMISSION

The State will evaluate the BAFO submission based on topics negotiated. BAFOs will be evaluated using the criteria and methodologies described in [SECTION 6. EVALUATION](#) or a BAFO addendum, if issued for purposes of this solicitation's negotiations.

8. CONTRACT AWARD

Contract Award, if made, will be to the Bidder that meets and/or exceeds the State's requirements and provides the best value to the State and will occur pursuant to the Key Action Dates of the solicitation document specified in [SECTION 2.3. KEY ACTION DATES](#) . However, the State, at its sole option, may change the Contract Award date.

The State will publish a Notification of Award to all Bidders that have submitted a proposal in response to this solicitation. Notification of Award will be sent at the time of Agreement execution.

All aspects of the Bidder's proposal are confidential until after the issuance of the Notification of Award.

9. DEBRIEFING

A debriefing may be held within fifteen (15) calendar days following Contract award at the request of any Bidder for the purpose of receiving specific information concerning the evaluation. The discussion will be based primarily on the qualifications, solution requirements and cost evaluations of the Bidder's proposal. A debriefing is not the forum to challenge the solicitation specifications or requirements. Statements made during the debrief are non-binding on the State and are intended for informational purposes only.

10. PROTESTS

This procurement process does not include any provisions to protest either the process or resulting contract award(s). However, pursuant to PCC § 6611(d), an unsuccessful Bidder may file a petition for a writ of mandate in accordance with Section 1085 of the Code of Civil Procedure. The venue for the petition for a writ of mandate will be Sacramento, California.