

CDT STP Request For Proposal



Request For Proposal (RFP)

RFP 25-10042

PART 1 – BIDDER INSTRUCTIONS

FOR

CDPH CAB Online Project

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Issued by:

STATE OF CALIFORNIA

Department of Technology

10860 Gold Center Drive, Rancho Cordova, CA 95670

in conjunction with

California Department of Public Health (CDPH)

1616, Capitol Avenue, Sacramento, CA 95814

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 Statement of Work (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 Officer 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 California Department of Public Health (CDPH), this solicitation is being conducted under the authority of the California Department of Technology (CDT) pursuant to Public Contract Code (PCC) §6611 et seq., 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 22: GLOSSARY OF TERMS.

1.1. PURPOSE

The purpose of this Request For Proposal (hereafter referred to as "solicitation" or "RFP") is to obtain proposals from qualified Bidders to provide Department of Technology and the State of California (hereafter referred to as "State") with IT services (hereafter referred to as "CAB Online Project").

This solicitation follows a traditional RFP approach to determine the most qualified bidder to Design, Develop, and Implement (DD&I) the Centralized Application Branch (CAB) Online solution (hereafter referred to as "CAB" or "the Solution") and maintenance, and optional post-implementation services.

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

Currently, only two (2) healthcare facility types submit initial applications and report change applications electronically. The remaining facilities submit manual applications. The California Department of Public Health (CDPH) proposes to enhance its license application submission system by enabling thirty-three (33) additional healthcare facilities to submit applications electronically, and integrate the new license application submission system with other CDPH systems.

The Solution Provider for the CAB Online project will develop and implement a solution that will replace the existing manual and paper-based application submissions while ensuring that associated information management and associated tasks are managed electronically.

1.2. BACKGROUND

CDPH is organized into eight centers dedicated to different aspects of public health. One of those centers, the Center for Health Care Quality (CHCQ), operates the Licensing and Certification Division (L&C), which is responsible for licensing and regulating healthcare facilities throughout the state. L&C is an essential part of CDPH's mission to optimize the health and well-being of the people of California, affecting the lives of millions of people in health care facilities each year. CHCQ is primarily funded by a grant from the Centers for Medicare & Medicaid Services (CMS), and by licensing fees paid by healthcare facilities.

The L&C Division's top priority is to protect patient safety and ensure quality care for all patients and residents of the more than 10,000 health-care facilities the program regulates in California. These include general acute care hospitals, acute psychiatric hospitals, home health agencies, hospices, skilled nursing facilities, and 30 other provider types.

Online Application Submission System/Adobe Experience Manager:

In December 2019, an online application submission system was implemented using Adobe Experience Manager (AEM) pursuant to Health and Safety Code Section 1272. The provider-facing system enables general acute care hospital (GACH) and acute psychiatric hospital (APH) providers to submit their applications electronically. The automated application submission system reduced many cumbersome manual processes for GACH and APH applications and has created a seamless route for application submissions and processing. For the other 33 provider types, the application review process remains manual. See [SECTION 1.3.1. CURRENT ENVIRONMENT](#) for the status of the AEM system.

Electronic Licensing Management System:

Centralized Applications Branch (CAB) analysts use the Electronic Licensing Management System (ELMS) to record and manage information about providers, facilities, the services they provide, and the status of their applications. Despite using the AEM and ELMS systems, the application process is highly manual and prone to delays. Out of 35 provider types, 33 of them must submit paper applications and payments via the U.S. Postal Service. Data submitted by providers in AEM must be manually rekeyed into ELMS. Delays in processing applications have the potential to impact patients if a facility is not promptly licensed to provide enough beds or other healthcare services. Manually keying data into ELMS risks recording incorrect information, such as creating duplicate records and mistyped data. Duplicate records are usually discovered when a provider is contacted twice for the same application, or when an application appears delayed in the workflow. Mistyped data is discovered incidentally when analysts are

reviewing the data in ELMS or in a report.

Business Problem/Opportunity:

The majority of applications submitted by providers are incomplete or incorrect and require correction to be processed. CAB gives applicants 60 days to submit corrected applications while putting the application in a “correction status” in ELMS. 86% of Initial, 78% for Change of Ownership (CHOW), and 69% of Report of Change applications are incomplete or require some other correction and are subject to the 60-day correction timeframe.

The delays caused by incomplete applications increase the overall number of days from the time the applications are received to the time the applications are approved. The average age for open Initial and CHOW applications is 231 days. Formal timeframes for completing the application review process for some facility types are mandated in the Health and Safety Code (HSC) or other legislation.

CDPH has a need to reduce errors in submitted applications. This action on its own is not sufficient to meet the mandated application review timeframes. However, reducing the errors in submitted applications will reduce the number of applications that require 60-day corrections. The most common error is that providers do not submit all the required application forms with their application packet, followed by errors related to not providing complete or correct information in the forms themselves. The GACH and APH online application systems have reduced both types of application errors and resulted in more complete applications with more correct data. This enables CAB to provide GACH and APH providers better service more efficiently, since there is less back-and-forth to create a complete application. Other provider types are asking when they will be able to submit forms and payments using the online application system.

CDPH has a need to create efficiencies in CAB operations. Analysts manually key information about the applicant, the facility, and other application information from the paper applications into ELMS. Workflow between CAB intake, managers, analysts, Fiscal Unit, and District Offices includes passing paper application packets and folders. Analysts must manually look up information in related systems— Caregiver Applicant Background System (CABS), Receiving, Staging, and Storing (RSS), Automated Survey Processing Environment (ASPEN) Central Office (ACO) and re-key relevant information into ELMS. Integration of the online application system with the ELMS system and other systems will reduce many of the cumbersome manual processes currently in place and will provide a simplified workflow that will contribute to provider satisfaction by creating a seamless route for application submissions and processing.

CAB’s workload consists of incoming applications that are processed daily and may take several months to complete from end-to-end. The number of incoming workloads received each calendar year (CY) and fiscal year (FY) are provided as below:

Application Type	CY 2022	CY 2023	CY 2024
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Received			
Initial	1,568	489	558
Change of Ownership	310	420	378
Report of Changes	12,223	13,074	10,436
Total	14,101	13,983	11,372

Provider Licensing Unit	CY 2022	CY 2023	CY 2024
License Renewal Applications			
License Facility Count	13,052	15,235	15,881

Certification Workload Received	FY 2022/2023	FY 2023/2024	FY 2024/2025
Medi-Cal Enrollment/Change Applications	2,222	1,936	2,673
Re-certification Applications	182	752	793
Adverse Action Requests	884	845	795
Total	3,288	3,533	4,261

CAB Online will be a cloud-based SaaS solution which will be utilized by both internal CDPH users and external stakeholders. The external stakeholders are made up of more than 14,000 health-care facilities. These health care facility types include general acute care hospitals, acute psychiatric hospitals, home health agencies, hospices, skilled nursing facilities, and 30 other provider types. CAB provides standardization and consistency of state licensing and federal certification through the application process. It reviews, analyzes, and evaluates requests for facility licensing/certification, and processes other license-associated transactions submitted by facility providers for approval.

The CDPH's existing license application submission system, GACH-APH, allows electronic submission of General Acute Care Hospital (GACH) and Acute Psychiatric Hospital (APH) application types. Currently, the GACH-APH system is undergoing a migration from the Adobe Experience Manager (AEM) platform to Microsoft Power Platform, which will be completed around the end of calendar year 2025 or in early 2026 and prior to the execution of this contract. Under the CAB Online project, the GACH-APH system will be expanded to include the remaining non-electronic healthcare facility application types. This will enable the additional healthcare facility types to submit initial, change of ownership, report of change and license renewal applications electronically, thereby reducing the overall time applications spend in a correction status by 50%.

1.3. CURRENT AND PROPOSED ENVIRONMENT

The following sections detail the current and proposed environments.

1.3.1. CURRENT ENVIRONMENT

The current licensing process involves:

- Intake
- Processing
- License renewal
- Enforcement

Roles:

- Provider
- CAB Specialists: Intake Specialists, Unit Managers, Application Analysts
- District Office specialist

Intake:

The provider completes and mails a paper application package containing the application, supporting documentation, and a payment (check) (initial application or change application). Currently, only two types of healthcare facilities, General Acute Care Hospital (GACH) and Acute Psychiatric Hospitals (APH), provide a digital interface for application submissions. Electronic payments are not currently accepted by any other healthcare facility types.

The application package is received by the Intake Analyst and assigned to one of the CAB Specialists for the review. Assignment is done manually.

Payments received as a part of an application package are verified for accuracy and are either transferred to the Financial Branch for processing or declined, notifying the Applicant to send the correct payment.

An application package is only processed when the correct payment is received.

An application is checked for completeness. A Provider gets notified via regular mail or email if there are any missing portions in a package. Missing information needs to be sent through regular mail or uploaded through AEM (Adobe Experience Manager) system for GACH and APH programs. Currently, the GACH-APH system is undergoing a migration from the AEM platform to MS Power Platform, which will be completed during the first or second quarter of 2026 and prior to the execution of this contract.

For the initial application, all the data and supporting documents are verified against the respective data sources: Secretary of State (SOS), Provider Application and Validation for Enrollment (PAVE), Department of Health Care Services (DHCS) list of restricted providers, CABS etc. All verifications are done manually, and the results are logged manually as well.

Change applications, including changes of ownership, are manually keyed into ELMS, even for the facility types that accept electronic applications. Initial applications require approval before data can be entered into the Electronic License Management System (ELMS).

Upon keying the application data in ELMS, it gets assigned to the respective District Office if the field inspection is required.

The District Office Representative receives the email notification of the pending field inspection from ELMS, conducts the inspection and logs the results.

Upon successful completion of verification and field inspection of the initial license, a new facility is manually keyed in ELMS along with the respective license information, including the license expiration date.

During each step of the license approval process there might be a need for extra information requests (additional documentation, corrections, clarifications etc.), which needs to be communicated to the Applicant by the same means as an application package was received. The Applicant must submit missing information or provide clarifications that need to be reviewed by the Analyst again.

Despite every step of the licensing process having a timeline defined by CDPH rules and the legislation, there is no automated tool in place for tracking the timelines. The team relies on the functionality of available office products such as spreadsheets and email clients.

Change Applications:

Providers must report changes within a certain timeframe for the event.

In order to reflect changes, Providers submit the application package and the payment the same way the initial applications are submitted.

Change applications are keyed in ELMS. Change applications are subject to verification that is done outside the system. If the package is incomplete or some information needs to be clarified by the Applicant, the request is made through the same channel where the application was received. In some cases, CAB Specialists can contact the Applicant via email or phone to provide an update on the application or request additional information.

The Applicant is notified of the outcome of the process. A new or updated license is mailed if the

application gets approved.

All the supporting documentation that is a part of the application package is scanned and stored on the shared network resources.

License renewal:

ELMS generates and sends license renewal letters and invoices on behalf of the Financial branch. CAB Specialists do not get notifications related to license renewal.

License revocation:

CAB unit processes self-requested license suspensions, terminations, and suspensions/revocations due to non-payments.

In case the Provider requests suspension or termination, the respective package must be submitted to CDPH. The application goes through the intake, gets keyed into ELMS and then routed to the Licensing Analyst and a District Office Specialist, as needed.

Pain points identified:

1. Communicating through regular mail is time-consuming. Every request takes at least six business days to complete.
2. Paper check payments and check payment processing.
 - a. Delays caused by mailing and transferring checks between CDPH structural units often result in bounced checks because of the inability to predict cashing time, which causes difficulties in cash flow planning on the Provider side.
 - b. Underpayments and refunds. Requesting missing payments takes additional time, and processing refunds is complicated by the inability to trace individual checks within the Financial branch; the Financial branch does not provide detailed reports on the checks cashed, only the total and the numbers of checks processed throughout the period.
 - c. Delays in payment processing can affect the status of an existing license or a license that is subject to renewal.
3. Sensitive information exchange through non-secure channels, emails in the first place.
4. Duplicate data entries for the programs that receive applications through AEM.
5. The need to use external tools (Excel spreadsheets) to track the application process and respective deadlines.
6. Inability to detect license-related changes, relying on self-reporting for change tracking.
7. Difficulties reaching out to the Provider and confirming the fact that the Provider received the renewal letter

8. The need for license state tracking tools despite the fact that all the data is already present in the system.

IT landscape:

- Application submission: AEM and the Future of Public Health (FoPH) migration solution that replaces AEM.
- ELMS for keeping record of licenses, deadlines and changes.
- ASPEN, Internet Quality Improvement and Evaluation System (iQIES) for tracking provider and facility compliance.

1.3.2. PROPOSED ENVIRONMENT

This section is intended to present an overview of the proposed system and will not specify any detailed technical requirements. The bidder requirements and solution requirements supporting this overview are included in EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS .

The proposed environment will continue with the same roles and process as identified in [SECTION 1.3.1. CURRENT ENVIRONMENT](#).

The proposed CAB Online solution will be a cloud-based SaaS solution. A solution with functionality and tools to improve the management of healthcare facility licensing. The CAB Online solution will streamline the major functions and processes below:

1. Application Intake
2. Change Applications
3. License Renewal
4. License Revocation

The CAB Online system will integrate with CDPH's existing Electronic Licensing Management System (ELMS). ELMS is a CDPH data system created in 2005 to manage state licensing-related data as a web forms application and acts as the licensing system of record.

The CAB Online project also plays a foundational role in the Future of Public Health (FoPH) Initiative 2, which aims to streamline transactional systems to create a one-stop, enterprise-scale systems as a core backbone for surveillance and licensing activities. The CAB Online system is key to laying the groundwork for the CDPH licensing landscape. The CDPH strategic plan also highlights the utilization of technology to create process improvements and efficiencies to reduce the need for additional positions to support the

increasing workload.

The proposed system will enable CAB to provide enhanced services to applicants by minimizing the back-and-forth between CAB and the applicant and shortening the overall time it takes to review and approve an application. It will also improve the quality of facility provider data by reducing the redundant keying of data into ELMS.

Intake:

The provider completes an application in the CAB Online tool, the provider will upload all supporting documentation, and the provider will make their payment from CAB Online via the Payment Portal.

The application will then go to an Application Pool within CAB Online where the Intake Analyst will pre-screen the application. The application is checked for completeness. The Provider gets notified via CAB Online if there are any missing portions in a package or outstanding fees.

For the initial application, all the data and supporting documents are verified against respective data sources: Secretary of State (SOS), Provider Application and Validation for Enrollment (PAVE), Department of Health Care Services (DHCS) list of restricted providers, and Caregiver Applicant Background System (CABS). All verifications are done electronically via automatic connections from CAB Online to these systems, and the results are logged into CAB Online.

Change applications, including changes of ownership, are also done by the provider in CAB Online, and they are automatically updated into the Electronic License Management System (ELMS). Initial applications need to get approval before data can be entered into the ELMS.

After the application data is entered into ELMS, it gets assigned to the respective District Office if the field inspection is required. The District Office Representative receives the email notification of the pending field inspection from ELMS, conducts the inspection and logs the results. Upon successful completion of verification and field inspection of the initial license, a new facility is updated via CAB Online in ELMS along with the respective license information, including the license expiration date.

Change Applications:

Providers must report changes within a certain timeframe for the event via CAB Online. In order to reflect changes, Providers enter the application package and the payment the same way as the initial applications are submitted.

Change applications are loaded into ELMS via CAB Online. Change applications are subject to verifications, that are done outside the system. If the package is incomplete or some information needs to be clarified by the Applicant, the request is made through the same channel where the application was received. In some cases, CAB specialists can contact the applicant via email or phone to provide an

update on the application or request additional information.

Applicant is notified of the outcome of the process. A new or updated license is available for download in CAB Online, if the application gets approved.

All the supporting documentation that is a part of the application package is loaded into CAB Online and stored in the document management system.

License renewal:

ELMS generates and sends license renewal letters and invoices on behalf of the financial branch. CAB Online is updated when a license renewal is required.

License revocation:

CAB unit processes self-requested license suspensions, terminations, and suspensions/revocations due to non-payments.

In case the Provider requests suspension or termination, the respective package must be submitted to CDPH via CAB Online. The application goes through the intake, uploaded to ELMS via CAB Online, and then routed to a Licensing Analyst and a District Office Specialist, as needed.

1.4. TERM OF CONTRACT

Effective upon approval of CDT, Office of Statewide Technology Procurement (OSTP), the term of the Contract is thirty-eight (38) months, consisting of twenty-six (26) months to complete all phases of system development including two (2) months of stabilization, followed by an additional twelve (12) months for the first year of Maintenance and Operations (M&O) which will run concurrently with the Warranty period. For the estimated contract execution date, refer to [SECTION 2.3. KEY ACTION DATES](#).

The State, at its sole discretion, may exercise its option to execute up to four (4) additional one-year (1-year) extensions. These optional extensions will only be utilized to perform knowledge transfer and Maintenance & Operations (M&O) services, to include production support and minor enhancements for a maximum Contract term of seven (7) years and two (2) months or eighty-six (86) months.

The Contractor shall not be authorized to deliver goods or commence performance of services described in this Contract prior to the Effective Date of the Contract. Any delivery of goods or performance of services by the Contractor that is commenced prior to the Effective Date shall be at no cost to the State.

The State is not obligated to use any or all of these options. The Contract is of no effect unless approved by CDT and no work shall begin before full execution of the Contract.

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 Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#). 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

The following sections provide details surrounding submitting a proposal response.

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 review and understand the details surrounding the phases of this solicitation and [SECTION 6. EVALUATION](#) to understand the evaluation process for each phase. 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. Do 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). Following the proposal submission or evaluations, Bidder communications may be sent directly to bidders via email.

Only questions submitted in writing and answered by the Procurement Officer shall be binding and official. All communications and questions must be submitted by email to the Procurement Officer(s) identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#). For further details, see [SECTION 2.2.2. QUESTIONS REGARDING THE SOLICITATION DOCUMENT](#).

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 OFFICER

The Procurement Officer is the State's designated authorized representative regarding this procurement.

Bidders shall communicate all correspondence regarding this procurement to both the Primary Procurement Officer and the Secondary Procurement Officer at the contact information below.

Table 2-1: Procurement Officer

PROCUREMENT OFFICERS	
Department Name:	California Department of Technology (CDT), Office of Statewide Technology Procurement (OSTP)
Procurement Officer:	Kerry Jones
Email:	Kerry.Jones@state.ca.gov

PROCUREMENT OFFICERS	
Phone:	MS Teams 916-460-9803
Secondary Procurement Officer:	Andrea Minning
Email:	Andrea.Minning@state.ca.gov
Phone:	MS Teams 916-460-9811

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 20: TEMPLATE FOR QUESTION SUBMITTAL via email (using the solicitation identification information from the solicitation title page) addressed to the Procurement Officer listed in [SECTION 2.2.1. PROCUREMENT OFFICER](#).

All communications must include the solicitation number in the subject line. To ensure a response, written questions must be received in writing by the date(s) specified in [SECTION 2.3. KEY ACTION DATES](#). Question and answer sets will be provided to all Bidders through the Cal eProcure site and will not identify the name of the submitting party. At the sole discretion of the State, questions may be paraphrased by the State for clarity. Questions submitted outside the date(s) specified in [SECTION 2.3. KEY ACTION DATES](#) will be answered at the State's option.

If a Bidder desires clarification or further information on the content of the solicitation, but whose questions relate to a 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](#) . The purpose of the Intent to Bid is to ensure bidders are aware and can comply with all non-negotiable items listed on the corresponding Exhibit.

This document shall be emailed to the Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#).

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.

Submission of an Intent to Bid does not obligate a Bidder to submit a proposal for this solicitation. An Intent to Bid may be withdrawn at any time prior to the proposal submission due date for any reason if the Vendor no longer wishes to proceed. Withdrawal from the procurement process following submission of a proposal is detailed in [SECTION 2.5.2. WITHDRAWAL AND RESUBMISSION/MODIFICATION OF PROPOSALS](#).

The Bidder must submit a completed ATTACHMENT 2: INTENT TO BID and ATTACHMENT 5: CONFIDENTIALITY STATEMENT, to obtain access to the Bidder's Library.

2.2.4. BIDDERS' LIBRARY

Throughout the solicitation, the State will make available a Bidders' 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 CAB Online project. It is each Bidder's responsibility to check frequently for updates to the 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 a solicitation addenda or notification to the Bidders. Bidders should check frequently for updated content.

To obtain access to the Bidders' Library, Bidders must sign and electronically submit both the ATTACHMENT 2: INTENT TO BID and ATTACHMENT 5: CONFIDENTIALITY STATEMENT to the Procurement Officer. The Bidder's authorized representative(s) identified on ATTACHMENT 2: INTENT TO BID will be the Bidder's Library's single point of contact. It is the Bidder's responsibility to provide the Procurement Officer with the required documentation to access the Bidders' Library URL. The URL will be emailed back to the Bidder's single point of contact within three (3) State business days after receipt of

ATTACHMENT 2: INTENT TO BID and ATTACHMENT 5: CONFIDENTIALITY STATEMENT.

Bidders are not allowed to share or provide their User ID, password, and URL to anyone outside the Bidder's procurement team. Bidders may be granted a second User ID and password if requested.

Bidders are encouraged to review the information in the Bidders' Library to gain a thorough understanding of the CAB Online project requirements, State expectations and the project solution requirements in which it operates.

The State will provide updated information as it becomes available during the course of the solicitation. The State will ensure the latest documents are provided in the Bidders' Library. It is the Bidder's responsibility to ensure up-to-date review of the Bidders' Library throughout the course of the solicitation.

It is the Bidder's responsibility to contact the Procurement Officer to gain access to the Bidders' Library.

2.2.5. CLOUD COMPUTING SERVICES

The Bidder shall develop the CAB Online system utilizing CDPH's preferred platform ecosystem, which includes Microsoft Dynamics, Power Platform, and Azure. This work must be conducted within CDPH's existing tenants. This ensures seamless integration with CDPH's existing infrastructure and leverages the robust capabilities of these platforms to deliver a scalable, secure, and efficient solution.

2.3. KEY ACTION DATES

Key Action Dates (KAD) provide 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 the dates listed after the Bidder's submission of the proposal. The dates listed after the Bidder's submission of the proposal are estimated and may be adjusted without addendum to this solicitation. All times listed are for Pacific Time/Pacific Standard Time.

Table 2.3.1: Key Action Dates (KAD)

KEY ACTION DATES		
Item	Action	Date and Time
1.	Release of Solicitation	10/21/2025
2.	Last day to submit ATTACHMENT 2: INTENT TO BID and ATTACHMENT 5: CONFIDENTIALITY STATEMENT (signed)	11/12/2025 3:00 pm PT/PST
3.	Last day to submit written questions using ATTACHMENT 20: TEMPLATE FOR QUESTION SUBMITTAL	11/26/2025 11:00 am PT/PST
4.	State's response to bidder's questions and release of potential addendum ¹	12/29/2025
5.	Last day to submit questions prior to the Proposal Submission	1/14/2026 2:00 pm PT/PST
6.	State's response to bidder's questions, and release of potential addendum ¹	2/4/2026
7.	Email Procurement Officers for response uploading instructions	2/11/2026 2:00 pm PT/PST
8.	Last day to submit the Proposal and be deemed eVAQ approved by OSTP. ²	2/26/2026 Bids due by 12:00 pm PT/PST
9.	Proposal Evaluation Period ³	2/27/2026 to 3/26/2026
10.	Negotiations*	3/27/2026
11.	Best and Final Offer (BAFO) submission*	5/12/2026
12.	BAFO evaluations*	

KEY ACTION DATES		
Item	Action	Date and Time
		5/27/2026
13.	Notification of Award/Contract Execution*	8/17/2026

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

² If the 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 the proposal's due date for the State to process and approve the Bidder's eVAQ application. All dates after submission of the proposal are approximate and may be adjusted as conditions indicate without addendum to this solicitation.

³ Based on the number of proposals received.

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 set forth in Public Contract Code (PCC) 6611 and 12100 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 Negotiations and Contract Award.

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

A deviation of any mandatory requirement will disqualify a Bidder from participating in Negotiations and Contract Award.

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 OFFICER](#), 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 2.4.6. 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. Specific conditions to be examined may be listed in [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#) and/or [SECTION 3.3. QUALIFICATION REQUIREMENTS](#).

2.4.4. EXCLUSION FOR CONFLICT OF INTEREST

No consultant shall be paid out of State funds for developing recommendations on the acquisition of telecommunications, information technology (IT) goods or services or assisting in the preparation of the Project Approval Lifecycle (PAL) documents (stages 2, 3, or 4), 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 PAL documents (stages 2, 3, or 4).

Further, no consultant shall be paid out of State funds for developing recommendations on the disposal of State surplus IT goods 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 DISCLOSURE 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 of 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 is a 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 overemphasized.

2.4.6. ADDENDA

The State may modify the solicitation at any time prior to submission of the proposal by issuing an addendum. Addenda will be numbered consecutively.

Addenda issued prior to the proposal response due date will be made available to all Bidders via Cal eProcure. The Addenda issued after the proposal response due date, however, will be released only to Bidders that have submitted a proposal.

If a Bidder determines that an addendum unnecessarily restricts its ability to bid, the Bidder is allowed five (5) business days to submit written questions regarding the addendum according to the instructions contained in [SECTION 2.2.2. QUESTIONS REGARDING THE SOLICITATION DOCUMENT](#) and the dates specified in [SECTION 2.3. KEY ACTION DATES](#) . Addenda issued with only Key Action Dates revisions or corrections to minor ambiguities or other similar errors, may not include a question and

answer period.

2.4.7. COST FOR DEVELOPING PROPOSAL

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

2.4.8. DISCOUNTS

In connection with any discount offered, except when a provision is made for a testing period preceding acceptance by the State, time will be computed from the date of delivery of the supplies or equipment as specified, or from date correct invoices are received in the office specified by the State if the latter date is later than the date of delivery. When a provision is made for a testing period preceding acceptance by the State, the date of delivery shall mean the date the supplies or equipment are accepted by the State during the specified testing period. Payment is deemed made, for the purpose of earning the discount, on the date of mailing the State warrant or check.

Cash discounts offered by bidders for the prompt payment of invoices will not be considered in evaluating offers for award purposes; however, all offered discounts will be taken if the payment is made within the discount period, even though not considered in the evaluation of offers.

2.4.9. SIGNATURE OF PROPOSAL

The Bidder must submit ATTACHMENT 9: COVER LETTER with its proposal.

The Cover Letter shall be considered an integral part of the proposal and any proposal form requiring signature must be signed by an individual authorized to bind the bidding firm contractually. The signature block must also indicate the title or position the individual holds in the firm signing the Cover Letter.

An unsigned proposal may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

2.4.10. IRREVOCABLE OFFER

Bidder's response to this solicitation must constitute a firm offer, which must remain irrevocable for not less than one hundred eighty (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 thirty (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.

2.4.11. FALSE OR MISLEADING STATEMENTS

Proposals that contain false or misleading statements, or provide references that do not support an attribute or condition claimed by the Bidder, may be the basis for rejecting the Bidder's proposal. 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 may be the basis for rejection of the Bidder's proposal.

2.4.12. 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.

2.5. 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's 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 view the key steps that comprise this solicitation. [SECTION 2.3. KEY ACTION DATES](#) list the milestones, mandatory steps and due dates for deliverables in this solicitation. Prior to submitting a response, Bidders must submit an ATTACHMENT 2: INTENT TO BID as detailed in [SECTION 2.2.3. INTENT TO BID](#) and a ATTACHMENT 5: CONFIDENTIALITY STATEMENT as detailed in [SECTION 3.2.3. CONFIDENTIALITY STATEMENT \(M\)](#)

However, Bidders must sign and submit [SECTION 2.2.3. INTENT TO BID](#) and ATTACHMENT 5: CONFIDENTIALITY STATEMENT to the Procurement Officer if requesting access to the Bidder's Library.

All Bidders must also submit an Electronic Vendor Application of Qualifications (eVAQ) as detailed in [SECTION 3.1.1. ELECTRONIC VENDOR APPLICATION OF QUALIFICATION \(EVAQ\) \(M\)](#).

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 and corrections made to those defects noted by the State in its review of the draft proposal, if any. Cost as identified in [SECTION 5. PROPOSAL/BID FORMAT AND SUBMISSION REQUIREMENTS](#) must be submitted under a separate cover. Bidders that submit proposals meeting the criteria identified in [SECTION 7. NEGOTIATIONS](#), will 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 and time specified in [SECTION 2.3. KEY ACTION DATES](#) , by submitting a written notification of withdrawal signed by an authorized representative of the Bidder in accordance with [SECTION 2.4.9. SIGNATURE OF PROPOSAL](#). The Bidder may thereafter submit a new or modified proposal prior to the proposal submission date and time specified in [SECTION 2.3. KEY ACTION DATES](#) . Modifications offered in any other manner, oral or written, will not be considered. Other than as allowed by law, proposals cannot be changed or withdrawn 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 and will be returned only at the State's option and at the Bidder's expense. At a minimum, each Bidder's proposal shall be retained as official files and will become a public record after the Notification of Award is issued. Materials the State considers confidential information (such as confidential information submitted to demonstrate Bidder responsibility) will be destroyed upon request of the Bidder.

2.6. PROTESTS

This solicitation is being conducted under (PCC) §6611 et seq; therefore protests are not applicable to

this solicitation.

2.7. ALTERNATIVE PROTEST PROCESS

This solicitation is being conducted under (PCC) §6611 et seq; therefore protests are not applicable to this solicitation.

3. PROPOSAL REQUIREMENTS

This section contains the mandatory qualification requirements and solution requirements pertaining to the required services that must be met in order to be considered responsive and responsible to this solicitation. In addition to meeting these requirements, the Bidder must adhere to all aspects of [EXHIBIT A: STATEMENT OF WORK](#) of the solicitation.

Unless designated otherwise, all the requirements in this section labeled Mandatory "(M)", Mandatory Scored "(MS)", and Mandatory Optional "(MO)" must receive a response. Items labeled as "Desirable "(D)" and Desirable Scored "(DS)" are optional.

The State has determined that it is best to define its own business needs, desired operating objectives, and desired operating environment. The State will not tailor these needs to fit some solution a Bidder may have available; rather, the Bidder shall propose to meet the State's needs as defined in this solicitation.

The Bidder qualifications requirements, Solution requirements (functional, non-functional, and transitional), Key Staff qualifications, Narrative Responses and Deliverables table detailed in this section may include one (1) or more of the following designations:

1. **(M)** Sections and requirements labeled as "Mandatory" or "M" are not negotiable. To be considered responsive and responsible to these requirements, all requirements identified as (M) must receive a response from the Bidder. A "fail" will result in a proposal being deemed non-responsive and, therefore, will be disqualified. 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 and responsible to these requirements, all requirements identified as (MS) must receive a response from the Bidder. A "fail" will result in a proposal being deemed non-responsive and, therefore, will be disqualified. 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 and requirements labeled as "Mandatory Optional" or "MO" are not negotiable. To be

considered responsive and responsible to these requirements, all requirements identified as (MO) must be responded to. A “fail” will result in a proposal being deemed non-responsive and, therefore, will be disqualified. Failure to respond to any (MO) requirements where indicated shall result in a “fail” and disqualification of the proposal. It is at the State’s option/discretion whether to utilize the option in the Contract.

4. **(D)/(DS)** Sections and requirements labeled as "Desirable" or “Desirable Scored” are not required to be offered by the Bidder in order to be compliant with the solicitation requirements. The Bidder may choose whether to meet requirements labeled as (D) or (DS). However, if a Bidder offers any (D) or (DS) requirements, the Bidder's response must meet the minimum requirements as stated in the solicitation. The State will review responses to (D) and (DS) requirements and award points, if applicable, per criteria stated in SECTION 6. EVALUATION.

3.1. PRE-QUALIFICATION 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 the proposal due date for any pre-qualification requirements.

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

The State’s eVAQ is an **external process to this solicitation**. The intent of the pre-qualification is to process as many of the administrative requirements required to do business in the State of California in advance to streamline the solicitation process. Bidder's will be required to have an approved application on file prior to the Key Action Date for the last day to submit a proposal (refer to [SECTION 2.3. KEY ACTION DATES](#)) in order to be eligible for contract award.

The application can be accessed at the OSTP VENDOR MAIN - Vendor Portal (<https://cadtprod.service-now.com/vendor>).

If the Bidder’s firm is new to the eVAQ process, account registration is necessary and is free of charge. Bidders should allow no fewer than two (2) weeks to process an eVAQ application.

Previously approved eVAQ application holders are responsible for ensuring their approved eVAQ application includes all appropriate and up-to-date requirements and provisions for this solicitation.

It is the responsibility of the Bidder to ensure their approved eVAQ includes all appropriate requirements and provisions for this solicitation.

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

3.1.1.1. INCORPORATION OF EVAQ REQUIREMENTS (M)

Bidders are advised that the Contract awarded as a result of this solicitation shall automatically incorporate by reference all eVAQ Requirements as well as its Terms and Conditions. The Bidder's eVAQ, in its entirety, shall be incorporated into any Contract awarded as a result of this solicitation, and shall remain in effect after eVAQ expiration, and throughout the life of the Contract awarded as a result of this solicitation, including all optional years.

3.2. ADMINISTRATIVE REQUIREMENTS

ADMINISTRATIVE REQUIREMENTS contains the mandatory administrative requirements that must be met in order to be considered responsive to this solicitation.

Most of the administrative bidding 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 QUALIFICATION \(EVAQ\) \(M\)](#) for more information.

Unless designated otherwise, all the requirements in this section are mandatory. The documents that must be submitted with the bidder's proposal are noted as "Mandatory" or "(M)" in this section.

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

1. (M) – All sections labeled as "Mandatory" or "M" are not negotiable. To be considered responsive and responsible to these requirements, all requirements identified as (M) must be responded to. A "fail" in a mandatory section will result in a proposal being deemed non-responsive and, therefore, will be disqualified. Failure to respond to any mandatory requirements shall result in disqualification of the proposal. The responses will be evaluated in accordance with [SECTION 6. EVALUATION](#).
2. (O) – All 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 minimum requirements as stated in the section. The State will review responses to optional requirements and apply points, if applicable, per criteria stated in [SECTION 6. EVALUATION](#).

3.2.1. COVER LETTER (M)

The Bidder must complete and submit ATTACHMENT 9: COVER LETTER 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 6: RESPONSE TO ADMINISTRATIVE REQUIREMENTS with its proposal. The Bidder must indicate its willingness and ability to satisfy these requirements by marking "Yes" in the "Bidder Agrees Yes/No" column on ATTACHMENT 6: RESPONSE TO ADMINISTRATIVE REQUIREMENTS. Answering a "No" to any of the mandatory administrative requirements or not submitting the required documents with its proposal may result in the proposal being deemed non-responsive and 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 5: CONFIDENTIALITY STATEMENT, for the Bidder's company. The completed confidentiality statement must be submitted with ATTACHMENT 2: INTENT TO BID, as indicated in [SECTION 2.3. KEY ACTION DATES](#).²

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.

²ATTACHMENT 5: CONFIDENTIALITY STATEMENT must be included in the proposal and/or prior to Bidder's access to the Bidders' Library.

3.2.4. ABILITY TO PERFORM (M)

Prior to award of the Contract, the State must be assured that the Bidder selected has all the resources to successfully perform under the Contract. This includes, but is not limited to, personnel in 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 (M)

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 (M)

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

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) working 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 proposal and the 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, 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 the 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. The Contractor is solely responsible for any payments to or claims made by subcontractors.

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 in the form, and submit it with its Proposal. The form is available at:

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

3.2.7. AMENDMENT (M)

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 (OSTP). Contract Amendments are detailed in EXHIBIT A: STATEMENT OF WORK.

3.2.8. FINANCIAL RESPONSIBILITY INFORMATION

3.2.8.1. FINANCIAL STABILITY

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 bidder continues to have the financial resources to sustain its operations during system development and implementation phases including the time required for the

State to pay the Contractor after system acceptance.

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-Document-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.

For this RFP, the Bidder shall develop the CAB Online system utilizing CDPH's preferred platform ecosystem, which includes Microsoft Dynamics, Power Platform, and Azure. This work must be conducted within CDPH's existing tenants. This ensures seamless integration with CDPH's existing infrastructure and leverages the robust capabilities of these platforms to deliver a scalable, secure, and efficient solution.

3.2.10. GENERATIVE ARTIFICIAL INTELLIGENCE (GENAI) DISCLOSURE (M)

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.

The 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.

3.2.11. STATEMENT OF WORK (M)

EXHIBIT A: STATEMENT OF WORK (SOW) 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 proposal. Refer to Part 2, Bidder Response EXHIBIT A: STATEMENT OF WORK.

3.2.11.1. INSURANCE COVERAGE (M)

In accordance with the EXHIBIT A: STATEMENT OF WORK, [SECTION 31. 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.

3.2.11.1.1. WORKERS' COMPENSATION/EMPLOYER'S LIABILITY (M)

The Prime Contractor shall maintain statutory workers' compensation and employer's liability coverage for all its employees who will be engaged in the performance of the Contract, including special coverage

extensions where applicable. Employer's liability limits of \$1,000,000 shall be required. The bidder is required to sign ATTACHMENT 8: WORKERS' COMPENSATION CERTIFICATION and submit it with its Final Proposal.

3.2.12. 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

3.2.12.1. BIDDER'S PREFERENCE AND INCENTIVE DECLARATION (M)

The Bidder must complete and submit ATTACHMENT 11: BIDDING PREFERENCES AND INCENTIVES, with its Final Proposal. The Bidder must indicate on ATTACHMENT 11: BIDDING PREFERENCES AND INCENTIVES whether it is or is not claiming each preference and/or incentive.

Refer to [SECTION 6. EVALUATION](#) for details on the amount and application of preference and incentive points during proposal evaluation.

3.2.12.2. 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/Certify-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 with its Final Proposal.

PLEASE READ THESE REQUIREMENTS CAREFULLY. FAILURE TO COMPLY WITH THE MINIMUM DVBE PARTICIPATION REQUIREMENT WILL CAUSE YOUR SOLICITATION RESPONSE TO BE DEEMED NONRESPONSIVE AND YOUR FIRM INELIGIBLE FOR AWARD OF THE PROPOSED CONTRACT.

3.2.12.2.1. DVBE PARTICIPATION REQUIREMENT (M)

The Bidder must fully comply with DVBE Participation Program requirements in its proposal and BAFO responses. Failure to submit a complete response with the proposal may deem the Bidder non-responsive and may be the basis for rejection of the Bidder's proposal. **The Bidder's response must include a minimum DVBE participation goal of three percent (3%) of the Bidder's net proposal price with one (1) or more DVBE.**

The Bidder must complete the Bidder Declaration GSPD-05-105 form and submit as ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105, with its Proposal. This form and completion instructions is available at:

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

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 7: BIDDER DECLARATION GSPD 05-105.

The form is available at:

www.documents.dgs.ca.gov/pd/poliproc/STD-843FillPrintFields.pdf

3.2.12.2.2. DVBE INCENTIVE (O)

In accordance with Military and Veterans Code §999.5(a), an incentive will be given to all Bidders who exceed the three percent (3%) DVBE mandatory participation. For Contract award evaluation purposes only, the State shall apply the incentive amount based on the amount of DVBE participation obtained above the three percent (3%) requirement.

If the Bidder is claiming a DVBE incentive using DVBE subcontractors, the Bidder must complete and submit a ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105 form, ATTACHMENT 10: DVBE DECLARATIONS, and ATTACHMENT 11: BIDDING PREFERENCES AND INCENTIVES for each DVBE subcontractor and submit with its Proposal.

If the Bidder is not using subcontractors, the Bidder is still required to complete ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105, answer the applicable questions on the form and submit with its Proposal. See [SECTION 6.3. PROPOSAL EVALUATION](#) for details on the amount and application of the incentive during proposal evaluation.

The GSPD-05-105 form and its completion instructions are available at:

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

DGS PD 843 is available at:

https://www.documents.dgs.ca.gov/dgs/fmc/gspd/pd/pd_843.pdf

3.2.12.3. 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 small business, 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 small business 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 Final Proposal for each SB:

1. ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105
2. ATTACHMENT 11: BIDDING PREFERENCES AND INCENTIVES
3. ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION

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

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

3.2.12.4. 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 percent (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 percent (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).

Bidders claiming the five percent (5%) preference must commit to subcontract at least 25 percent (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 Office of Small Business and DVBE Services (OSDS) no later than 5 p.m. of 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.

The preference of a non-small business firm that commits to small business or microbusiness subcontractor participation of 25 percent (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 11: BIDDING PREFERENCES AND INCENTIVES
3. ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION

If the Bidder is not using subcontractors, the Bidder must respond to the applicable questions on the GSPD-05-105 form and submit it as ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105 with its Proposal.

3.2.12.5. COMMERCIALLY USEFUL FUNCTION (M)

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 12: 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.

If the Bidder is not using subcontractors, the Bidder must respond to the applicable questions on the GSPD-05.105 form, and submit it as [ATTACHMENT 12: BIDDER DECLARATION GSPD 05-105](#) with its Proposal.

The Bidder Declaration GSPD-05-105 is available at:

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

Bidder(s) may be required to submit additional written clarifying information regarding CUF on ATTACHMENT 12: 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.

3.2.12.6. 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 one hundred thousand dollars (\$100,000) and the Bidder meets 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 at the URL below and submit the appropriate response forms as ATTACHMENT 13: TACPA PREFERENCE REQUEST FORMS with its 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>

3.2.13. PRODUCTIVE USE REQUIREMENTS

The productive use requirements protect the State from being an experimentalist for 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 [SECTION 3.2.13.1. CUSTOMER IN-USE](#). 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 proposed submission and throughout Contract duration.

3.2.13.1. 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, substantially in the conformation bid;
2. For a paying customer external to the Bidder's organization; and
3. For at least the number of months shown in Table 3.13.1 below and prior to the proposal submission due date.

Table 3.13.1: 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	Less than \$10,000	1 month
	\$10,000 up to \$100,000	3 months
	More than \$100,000	9 months

PRODUCT	PROJECT COST	PROPOSAL SUBMISSION
essential system software.		
Category 2 - All Information Technology Equipment and Non-critical Software. Information technology equipment is defined in SAM §4819.2.	Less than \$10,000	1 month
	\$10,000 up to \$100,000	3 months
	More than \$100,000	4 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.

3.2.13.2. 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.

3.2.13.3. OPEN SOURCE SOFTWARE REQUIREMENTS

If the Bidder's proposed solution includes Open Source software, the Open Source software must adhere to [SECTION 3.2.13. 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

3.3. QUALIFICATION REQUIREMENTS

This section contains the mandatory qualification requirements pertaining to the required services that must be met in order to be considered responsive and responsible to this solicitation. In addition to meeting these requirements, the Bidder must adhere to all aspects of EXHIBIT A: STATEMENT OF WORK of the solicitation.

Unless designated otherwise, all the requirements in this section labeled Mandatory "(M)", Mandatory Scored "(MS)", must receive a response. Items labeled as "Desirable "(D)" and Desirable Scored "(DS)" are optional.

The State has determined that it is best to define its own business needs, desired operating objectives, and desired operating environment. The State will not tailor these needs to fit some solution a Bidder may have available; rather, the Bidder shall propose to meet the State's needs as defined in this solicitation.

The Bidder qualifications, Bidder references, Key Staff qualifications and Key Staff references requirements detailed in this section may include one (1) or more of the following designations:

1. **(M)** Sections and requirements labeled as "Mandatory" or "M" are not negotiable. To be considered responsive and responsible to these requirements, all requirements identified as (M) must receive a response from the Bidder. A "fail" will result in a proposal being deemed non-responsive and, therefore, will be disqualified. 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 and responsible to these requirements, all requirements identified as (MS) must receive a response from the Bidder. A "fail" will result in a proposal being deemed non-responsive and, therefore, will be disqualified. 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. **(DS)** Sections and requirements labeled as "Desirable Scored" are not required to be offered by the Bidder in order to be compliant with the solicitation requirements. The Bidder may choose whether to meet requirements labeled as DS. However, if a Bidder offers any (DS) requirements, the Bidder's response must meet the minimum requirements as stated in the solicitation. The State will review responses to DS requirements and award points, if applicable, per criteria stated in [SECTION 6. EVALUATION](#).

The Bidder shall 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 minimum 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. Refer to ATTACHMENT 14: BIDDER QUALIFICATIONS FORM - INSTRUCTIONS and ATTACHMENT 17: KEY STAFF QUALIFICATIONS FORM – INSTRUCTIONS for more information.

3.3.1. BIDDER QUALIFICATIONS (M)

The Bidder must complete and submit, as part of the proposal response, ATTACHMENT 15: BIDDER QUALIFICATIONS FORM, to confirm the Bidder's experience meets all the minimum requirements

identified in ATTACHMENT 15: BIDDER QUALIFICATIONS FORM. Mandatory qualifications are labeled as such and require a response. Requirements labeled as Desirable are not mandatory, therefore a response is optional. Regardless of the qualification designation, it is incumbent upon the Bidder to provide enough detail in the proposal for the state to evaluate the Bidder's ability to meet the requirements and perform the services as described in this solicitation and associated Statement of Work. Refer to ATTACHMENT 14: BIDDER QUALIFICATIONS FORM - INSTRUCTIONS for further requirements and instructions.

Depending on the qualification, Bidders may need to cite multiple projects to meet a qualification. The Bidder must have been the prime contractor for each of the cited projects. The ATTACHMENT 15: BIDDER QUALIFICATIONS FORM must be used to cite project details for each qualification. To meet a qualification, the Bidder must provide information for a minimum of one (1) cited project and not exceed the maximum of five (5) cited projects to confirm the Bidder as a firm possesses the experience to meet the qualification.

Unless otherwise noted, all Bidder Experience must have occurred within 10 years prior to the solicitation release date. If the referenced project is ongoing, then the project end date will be the solicitation release date see [SECTION 2.3. KEY ACTION DATES](#) . A separate ATTACHMENT 15: BIDDER QUALIFICATIONS FORM must be submitted for each cited project used to meet the corresponding mandatory qualifications. Descriptions of experience must be adequately detailed so that the State can easily confirm that the Bidder's experience fulfills the mandatory qualifications. If the State cannot determine that the experience provided meets the mandatory qualifications, then the Bidder's proposal may be deemed non-responsive.

All experience cited must have occurred in a state or territory of the United States of America within ten (10) years of the solicitation release date.

Bidders are encouraged to thoroughly review the instructions provided in ATTACHMENT 14: BIDDER QUALIFICATIONS FORM - INSTRUCTIONS.

When completing the Bidder Qualifications Form, the Bidder must indicate its willingness and ability to meet each mandatory qualification. Failure to agree to meet a mandatory qualification may result in a Bidder's response being disqualified.

Refer to [SECTION 6. EVALUATION](#) for details on how the Bidder Qualifications Forms will be scored and how points will be awarded based on desirable experience as part of the overall evaluation.

3.3.2. BIDDER REFERENCES (M)

The bidder must complete and submit as part of the proposal ATTACHMENT 16: BIDDER REFERENCE FORM for each of the projects cited on the corresponding ATTACHMENT 15: BIDDER

QUALIFICATIONS FORM.

The purpose of the bidder reference requirement is to provide the State with the ability to assess 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 16: BIDDER REFERENCE FORM must be completed in its entirety, and dated by a reference that performed a management or supervisory role on the reference project to be considered responsive. References must be external to a Bidder's organization and corporate structure. The ATTACHMENT 15: BIDDER QUALIFICATIONS FORM must be returned to the Bidder for submission with the proposal. Photocopies may be accepted as long as the form, response, and signature are legible. No information corrections or changes may be made to the reference form by the Bidder. Forms with alterations or changes to the entered information may deem the Bidder 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 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.

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 cause the proposal to be rejected. If needed, the State may contact either the Bidder and/or staff references to validate the reference submitted. The evaluation team will make two (2) attempts via email to validate Bidder experience using the information provided in the Bidder reference forms.

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.

If the reference is a current CDPH employee, the Bidder must first contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#) to ensure the current State employee is not a

member of the solicitation's evaluation team or a CAB Online project team member. In addition, only one (1) reference from CDPH is permitted for each Bidder for this solicitation.

3.3.3. STAFF QUALIFICATION (M) (DS)

The Bidder is fully responsible for all necessary staffing resources to successfully implement the CAB Online requirements within the agreed-upon schedule and to perform to the standards set forth in the SOW Service Level Agreement (SLA). 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 sixteen (16) 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 as part of the proposal ATTACHMENT 18.1 through 18.32 to confirm that each of the proposed sixteen (16) Key Staff possess the experience and mandatory qualifications as specified for their respective project role. The Bidder must provide complete information to confirm that each of the sixteen (16) proposed staff members possess the experience and qualifications as specified for their project role described in all required ATTACHMENT 18.1 through 18.32. Each cited project for each staff member must be submitted. It is incumbent upon the Bidder to provide enough detail in the response for the State to evaluate the Bidder's proposed staff's ability to meet the requirements and perform the services as described in this solicitation.

The Bidder's proposed staff must meet all the mandatory qualification requirements. All experience used to meet the minimum requirements must have occurred in the United States of America within the last ten (10) years prior to the solicitation release date, unless stated otherwise. Points will be awarded to Bidders that meet the criteria set forth in the desirable experience qualifications as specified in [SECTION 6. EVALUATION](#). It is the Bidder's responsibility to ensure that each mandatory qualification is met in full and addressed in the key staff qualification forms for the State to determine compliance with the requirements. If the State cannot determine that the years of experience meet the mandatory qualifications, then the Bidder's proposal may be deemed non-responsive.

The key staff are required to perform the services as described in EXHIBIT A: STATEMENT OF WORK.

Of the key staff identified below, only one (1) individual can serve per key staff role.

1. Engagement Manager
2. Project Manager
3. Scrum Master
4. Solution Architect
5. System Configuration and Integration Lead
6. Lead Business Analyst
7. Lead Developer

8. Lead Database Administrator
9. Quality Assurance Testing Lead
10. Release Management Lead
11. Lead Security Analyst
12. Solution Operations Lead
13. Organizational Change Management Lead
14. Communications Lead
15. Developer
16. Quality Assurance Tester

The sharing of roles is NOT allowed for the following Key Staff:

- Project Manager

3.3.4. STAFF REFERENCES (M) (MS)

The bidder must complete and submit as part of the proposal ATTACHMENT 18.1 through 18.32. The Bidder must submit a completed staff reference form for each project cited in all ATTACHMENT 18.2 through 18.32.

The purpose of the key staff reference requirement is to provide the State with the ability to evaluate the staff's experience in providing similar or relevant services to other organizations through a satisfaction rating provided by the staff's previous 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 CAB Online project.

Bidder Staff References may be contacted to verify the submitted information in accordance with [SECTION 6.3.4. QUALIFICATION REQUIREMENTS EVALUATION](#) . If needed, the State may contact the staff references to validate the reference submitted. The Evaluation Team will make two (2) attempts via email to validate Staff experience using the information provided in the Staff reference forms, as applicable. Failure to provide verifiable references may deem the Bidder non-responsive and may be the basis for rejection of the Bidder's proposal.

References must meet the following criteria:

- Must be from the company or Agency for which the project was developed and/or services provided.
- Must be external to the Bidder's organization and corporate structure.
- May not include individuals who have or are currently working for the Bidder.
- Must be someone who performs a management or supervisory role on the referenced project.
- Must be able to provide an objective assessment of the proposed staff's performance.

- A contract and all amendments to it are considered as one project. Amendments to a contract cannot be submitted as separate projects.

If the reference contact is not permitted either legally or by company/organization policy to provide a reference, the reference contact is requested to type or print their full name and title on the reference form together with a brief statement outlining the reason they are unable to provide a reference.

Prior to the Bidder using a current CDPH employee or CDPH contractor as a reference, the Bidder shall contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#) to ensure the employee or contractor is not a member of the evaluation team or an employee of the CDPH Immunization Branch. In the case of using a current CDPH employee or contractor as a reference, only one (1) reference from CDPH is permitted.

Refer to ATTACHMENT 17: KEY STAFF QUALIFICATIONS FORM – INSTRUCTIONS and individual KEY STAFF REFERENCE FORMS for detailed instructions on how to fill out the respective Key Staff Reference forms.

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

3.3.4.1. 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 experience that the Staff person accrued on the referenced project. For each period in which the Staff person performed work applicable to the claimed experience for a minimum of twenty (20) work days of a minimum total of 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 equivalent 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 6.3. PROPOSAL EVALUATION](#) on how the requirements will be scored

as part of the overall evaluation.

3.4. SOLUTION REQUIREMENTS

This section contains the mandatory solution requirements pertaining to the proposed system that must be met in order to be considered responsive and responsible to this solicitation. In addition to meeting these requirements, the Bidder must adhere to all aspects of EXHIBIT A: STATEMENT OF WORK of the solicitation.

The Bidder must meet the mandatory Functional and Non-Functional Requirements, Narrative Responses and Deliverables Table. The Bidder must meet the mandatory scored Functional and Non-Functional Requirements Workbook and Narrative Responses. Failure to meet any of the mandatory or mandatory scored requirements may result in a proposal being deemed non-responsive and therefore disqualified.

The Bidder must meet the Mandatory Optional (MO) requirements, comply with the deliverables in the Deliverables Table. Failure to meet any of the mandatory requirements may result in a proposal being deemed non-responsive and therefore disqualified.

3.4.1. FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS (M) (MS) (MO)

The Bidder must complete and submit as part of its Proposal, EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS. An explanation of the exhibit columns and instructions for completion are available in EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

The Bidder must indicate compliance and confirmation to each of the requirements by marking "Yes" or "No" in the column labeled "Contractor Agrees to provide the Requirement Yes/No". A blank, "N/A" or "No" answer will be deemed non-responsive and will be the basis for rejection of the Bidder's proposal.

The Bidder must also indicate if the requirement will be met by an Out of the Box solution by marking "Yes" or "No" in the column labeled "Out of the Box Requirement / Solution." Out of the box is defined as the product's functionality and features are immediately available and ready to use upon installation without any customization or significant configuration.

The requirements are separated into three (3) categories defined as the following:

Functional Requirements (FR)

The Functional Requirements represent the CAB Online business functionality, needs, actions, or operations that are required to meet the application's objectives. These are organized into Main Business Capability/Function, then Sub Business Capability/Function, and then followed by associated Detailed Requirements.

Non-Functional Requirements (NFR)

The Non-Functional Requirements do not directly relate to the functionality of the CAB Online solution, but rather describe conditions or qualities of the solution, quality of service requirements or operational characteristics. These are organized into NFR Categories, which include:

- Interoperability
- Extensibility & Configurability
- Availability & Reliability
- Usability, Financial Operations (FinOps)
- Performance & Capacity
- Quality Assurance & Testing
- Maintainability
- Project Transition

Project Transition Requirements (PTR)

Project and transition requirements are the Contractor's responsibilities throughout the contract.

The Bidder must not alter the structure or the content of EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

Refer to [SECTION 6. EVALUATION](#) for details on the Functional and Non-Functional Requirements and how the requirement will be scored as part of the overall evaluation.

3.4.2. DELIVERABLES TABLE (M)

The Bidder must complete and submit as part of its Proposal EXHIBIT D: DELIVERABLES TABLE . An explanation of the exhibit columns and instructions for completion are available in EXHIBIT D: DELIVERABLES TABLE.

The Bidder must indicate compliance and confirmation with each of the deliverables by marking “Yes” or “No” in the column labeled “Contractor Agrees to provide the Deliverable Yes/No”. A blank, "N/A" or “No” answer will be deemed non-responsive and will be the basis for rejection of the Bidder’s proposal.

The Contract Deliverables and Milestones Table defines the deliverables, tasks, and specifies the timing and milestone completion in which they will be produced and/or updated based on activities listed in the SOW.

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

Refer to [SECTION 6. EVALUATION](#) for the details of the Deliverables Table evaluation.

The following provides a description of each column and the responsibility of the Bidder for completing the EXHIBIT D: DELIVERABLES TABLE:

Column Name	Description
ID	A unique identifier for each deliverable for the CAB Online project.
Task/Deliverable Description	A detailed outline of what is expected of the Contractor to complete and include with each deliverable, including frequency, where appropriate.
Resulting Work Product(s) / Outputs	The work product(s) expected as a result of the task/deliverable.
Timing	When the task/deliverable needs to be completed.
Milestone/Payment Point	Defines the point at which the State will pay for the completion of the deliverable.
Contractor Agrees to Meet (Yes/No)	The Contractor must indicate Yes or No on each deliverable listed if they agree to meet this deliverable.

The Bidder is reminded that in order to be considered responsive to the requirements, the Bidder must provide enough detail in its proposal in order for the State to evaluate the Bidder's ability to meet the requirements. Refer to [SECTION 6.2.1. EVALUATION OF REQUIRED INFORMATION AND REQUIREMENTS](#) for details on how the requirements will be scored as part of the overall evaluation.

3.4.3. NARRATIVE RESPONSE REQUIREMENTS (MS)

The purpose of the narrative response requirement is to provide the project team with how the proposed Bidder would manage, develop, and implement their proposed CAB Online solution. The Bidder must submit, as part of its proposal, its response to [ATTACHMENT 19: NARRATIVE RESPONSE](#). The Narrative response shall follow the outline provided in [SECTION 1. NARRATIVE RESPONSE](#) and address the topics described in Narrative Response Topics.

The Bidder is reminded that in order to be considered responsive to the requirements, the Bidder must provide enough detail in their proposal for the State to evaluate the Bidder's ability to address the narrative response topics. Refer to [SECTION 6.3.5.3. NARRATIVE RESPONSE\(S\) REQUIREMENTS](#) for details on how the narrative response will be scored as part of the overall evaluation.

4. COST

Cost is a primary evaluation criterion weighted at 50% of the total points. Evaluation in this category will

be based on the lowest total estimated net cost as calculated according to the methodology in this section and [SECTION 6. EVALUATION](#).

This section contains the mandatory 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 market 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.

The Bidder is required to enter all cost data in the format prescribed by EXHIBIT C: COST WORKSHEETS. All proposed costs for all deliverables as shown in EXHIBIT C: COST WORKSHEETS must be inclusive of all cost elements, thereby including the cost of any and all services required in EXHIBIT A: STATEMENT OF WORK.

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

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

COST CONSIDERATION

One-time Costs:

One-time costs or fixed-price deliverable-based implementation costs are those costs paid by the State for material and services necessary for the acquisition and implementation of the proposed Solution, including:

- Implementation/Installation costs—development services, testing, the cost of personnel, travel, hardware/software, and any other equipment and/or services necessary to affect an operational system.
- Organization change management and training costs, including personnel.
- Any other costs that are assumed to be the responsibility of CDPH but are required for the successful development and implementation of the CAB Online solution.

Ongoing Costs:

Ongoing or continuing costs are those costs that are projected to be paid by the State to the Contractor on a monthly basis or some other reoccurring basis. Any discounts offered to the State shall be reflected in the monthly invoices (adjusted rates).

The following are continuing costs:

- Solution maintenance and operational costs
- Licensing and associated costs
- Contractor personnel costs
- Help Desk Costs

4.1. COST WORKBOOK (M)

Services, features, and costs included in EXHIBIT C: COST WORKSHEETS are those that the Bidder must provide for the term of the Contract as identified in EXHIBIT A: STATEMENT OF WORK. All Bidders must provide individual costs as indicated in the cost worksheets and submit with the bidder's proposal. Items submitted with no price will be considered as offered at no cost.

4.2. COST WORKBOOK INSTRUCTIONS

The cost workbook includes multiple cost worksheets that must be completed by the Bidder and submitted with its Cost Proposal to be considered responsive. The Cost Workbook includes worksheets that list all cost elements required to implement the system, selected data migration, training and

organizational change management services, and maintenance and operation services. The Bidder must submit the completed Cost Workbook separately from the proposal as described in [SECTION 5.3](#).

[DELIVERY OF SUBMITTALS](#) to be considered responsive.

The Bidder is required to enter all cost data in the format prescribed by the cost worksheets, even if there are no costs for an 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). All other fields must not be modified. If the cost worksheet is modified or cells are left blank, the State may reject the Bidder's proposal. The cost worksheets must be filled out completely or the State may reject the Bidder's proposal.

The State has populated some of the cells with formulas; however, it is the Bidder's responsibility to ensure worksheets and calculations are correct and accurate. The State will not assume responsibility for any cost figures that do not calculate properly. Cells highlighted in yellow, indicate the cells in which the Bidders must enter its cost.

1. Cost Summary

This worksheet is auto populated with detailed costs from the other worksheets. No data entry is required of the Bidder(s). The Bidder(s), however, is responsible for ensuring summary calculations are accurate. Unanticipated Tasks are a fixed value equal to 10% of the total one-time Design, Development & Implementation (DD&I) Costs.

2. DD&I Deliverables

This worksheet identifies the Bidder's cost for each contract deliverable. Bidders must complete yellow-highlighted cells with proposed deliverable costs. All cost items are mandatory and must have a cost entered for each deliverable on the worksheet. The costs to deliver all Exhibit B Mandatory Functional, Non-Functional, and Project and Transition Requirements must be included in the fixed-priced deliverables.

3. Maintenance & Operations

The State may exercise additional M&O service options in four (4), one-year (1) terms at the originally agreed-upon rates specified in this worksheet. Bidders must complete yellow-highlighted areas for each term of M&O services. The M&O pricing is fixed price; however, Bidders may propose different monthly rates for each Optional Year.

4. Unanticipated Tasks

The State limits the budget for unanticipated tasks not to exceed 10% of the total DD&I costs of the base Contract, excluding maintenance and operations. Unanticipated tasks are additional work that is within

scope, that must be performed but was not identified in the State's solicitation document. For example, during the contract period, legislative and/or program changes may necessitate system and/or software modifications in the form of change requests or enhancements. Costs for unanticipated work will be based on the Bidder labor costs identified in this cost worksheet. The State and Contractor must agree upon the work to be performed and the cost, which will be documented and pre-approved through a Work Authorization process. No work can be performed in advance of the State's agreement of unanticipated tasks.

The Bidder must enter the hourly rate for each required staff classification (highlighted in yellow). The Bidder must also include all additional staff positions required for the project (add more rows, if necessary).

4.3. PROJECT PAYMENT TERMS

In accordance with Public Contract Code, §12112, the State will withhold, from each invoiced payment amount to the Contractor, an amount equal to fifteen percent (15%) of the payment per the SOW. Invoices for the withheld amounts shall be submitted by Contractor upon Final System Acceptance of the CAB Online project.

The payment schedule for CAB Online implementation is deliverables-based except for maintenance and operations services (M&O services). M&O services shall be paid monthly in arrears at the rates indicated in EXHIBIT C: COST WORKSHEETS except for services that involve Solution enhancements which shall be deliverable-based, as defined in EXHIBIT A: STATEMENT OF WORK .

4.4. SALES TAX

Sales tax is not to be included in EXHIBIT C: COST WORKSHEETS. If awarded the Contract, sales tax, if applicable, should be added at the 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 submitting a proposal.

Bidder shall upload a soft copy of its entire proposal, including the Cost Workbook, as specified in [SECTION 5.3. DELIVERY OF SUBMITTALS](#) and [SECTION 5.6. PROPOSAL FORMAT AND CONTENT](#). 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.

It is important that Bidder's soft copy proposals are submitted in their entirety. Proposals not submitted in the manner specified may be rejected.

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 5.6. PROPOSAL FORMAT AND CONTENT](#).

5.3. DELIVERY OF SUBMITTALS

5.3.1. ACCESS TO STATE'S FILE-SHARING SITE

Bidder must, by email, provide the Procurement Officer specified in [SECTION 2.2.1. PROCUREMENT OFFICER](#) with no more than two (2) Bidder Contacts to upload the soft copy of Bidder's forms and

proposal by the date specified in [SECTION 2.3. KEY ACTION DATES](#) . Once provided, an invitation to a file-sharing site will be sent to the specified individual. A separate site will be created for each Bidder only accessible by the Bidder Contacts and the Procurement Officer. It is Bidder's responsibility to gain access to the file-sharing site to submit their proposal.

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.

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.

COST:

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

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.

The Bidder should submit all of its proposal documents to Volume 1 - Proposal Response and Volume 2 - Cost on the CDT SharePoint site. The response package must be labeled as follows:

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 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 of 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 may include a PDF version of its proposal; however, the Bidder must ensure PDF versions are identical in content and pagination. **The content of all PDF files must be searchable.**
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 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 SharePoint folders.
8. As stated in [SECTION 3.2.3. CONFIDENTIALITY STATEMENT \(M\)](#). Proposals marked "confidential" or "proprietary" may exclude the Bidder from consideration for award.

Volume 2: Cost must be submitted separately from Volume 1. If cost information is not submitted separately, the proposal may be rejected.

5.5. FORMATTING

It is Bidder's responsibility to ensure its proposal is submitted in a manner that enables the State to easily locate all response descriptions and exhibits for each requirement of this solicitation.

5.5.1. SOFT COPY

These instructions describe the submission format and the approach for the development and presentation of submission data. Format instructions and all requirements and questions in the RFP must be responded to, and all requested data must be supplied.

1. Responses and proposals must be received by the due date specified in [SECTION 2.3. KEY ACTION DATES](#) . Late receipt may cause the state to deem a Bidder nonresponsive.
2. Bids must be submitted in electronic file format (soft copy) to the CDT's SharePoint Site.

Soft copy files must be submitted in searchable portable document file (PDF) format (Acrobat v. 6.0 or higher), with the exception of the following items, which must be submitted in MS Excel format (version 2019 or higher):

EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS

EXHIBIT C: COST WORKSHEETS (to be submitted separately)

Soft copies of files must be uploaded as individual files. With the exception of EXHIBIT C: COST WORKSHEETS each file must be labeled with the following naming information:

Exhibit Number – Abbreviated Exhibit Name – Bidder Name.[ext]

Example: *Exh 7 – Bidder Declaration – ABCorp.pdf*.

5.6. PROPOSAL FORMAT AND CONTENT

Each volume of the Proposal must be provided separately, submitted, and must be structured in the manner stated below.

5.6.1. VOLUME 1: RESPONSE TO ADMINISTRATIVE REQUIREMENTS

The Bidder's response must include the following items in the order listed.

1. Table of Contents. This section must contain a Table of Contents. All parts of the proposal, including forms, must be identified by volume and page number. The Table of Contents must identify all forms, figures, charts, graphs, tables etc.
2. ATTACHMENT 9: COVER LETTER

3. Required solicitation exhibits, in the following order:

- a. ATTACHMENT 2: INTENT TO BID
- b. ATTACHMENT 3: FOLLOW -ON DISCLOSURE
- c. ATTACHMENT 4: RESPONSIBILITY CERTIFICATION
- d. ATTACHMENT 5: CONFIDENTIALITY STATEMENT
- e. ATTACHMENT 6: RESPONSE TO ADMINISTRATIVE REQUIREMENTS
- f. ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105
- g. ATTACHMENT 8: WORKERS' COMPENSATION CERTIFICATION
- h. ATTACHMENT 10: DVBE DECLARATIONS
- i. ATTACHMENT 11: BIDDING PREFERENCES AND INCENTIVES
- j. ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION :

4. Preference/Incentive Exhibits (Required only as indicated)

- a. ATTACHMENT 13: TACPA PREFERENCE REQUEST FORMS (required if claiming TACPA preference)

5. Response to Qualification requirements, solution requirements, deliverables, and narrative response in the following order:

1. ATTACHMENT 15: BIDDER QUALIFICATIONS FORM
2. ATTACHMENT 16: BIDDER REFERENCE FORM
3. ATTACHMENT 17.1: PROJECT MANAGER - QUALIFICATIONS FORM
4. ATTACHMENT 17.2: PROJECT MANAGER - REFERENCE FORM
5. ATTACHMENT 17.3: SCRUM MASTER - QUALIFICATIONS FORM
6. ATTACHMENT 17.4: SCRUM MASTER - REFERENCE FORM
7. ATTACHMENT 17.5: LEAD DEVELOPER - QUALIFICATIONS FORM
8. ATTACHMENT 17.6: LEAD DEVELOPER - REFERENCE FORM
9. ATTACHMENT 17.7: LEAD BUSINESS ANALYST - QUALIFICATIONS FORM
10. ATTACHMENT 17.8: LEAD BUSINESS ANALYST - REFERENCE FORM
11. ATTACHMENT 17.9: QUALITY ASSURANCE TESTING LEAD - QUALIFICATIONS FORM
12. ATTACHMENT 17.10: QUALITY ASSURANCE TESTING LEAD - REFERENCE FORM
13. ATTACHMENT 17.11: SOLUTIONS ARCHITECT - QUALIFICATIONS FORM
14. ATTACHMENT 17.12: SOLUTIONS ARCHITECT - REFERENCE FORM
15. ATTACHMENT 17.13: SYSTEM CONFIGURATION AND INTEGRATION LEAD - QUALIFICATIONS FORM
16. ATTACHMENT 17.14: SYSTEM CONFIGURATION AND INTEGRATION LEAD - REFERENCE FORM
17. ATTACHMENT 17.15: LEAD DATABASE ADMINISTRATOR - QUALIFICATIONS FORM

18. ATTACHMENT 17.16: LEAD DATABASE ADMINISTRATOR - REFERENCE FORM
19. ATTACHMENT 17.17: RELEASE MANAGEMENT LEAD - QUALIFICATIONS FORM
20. ATTACHMENT 17.18: RELEASE MANAGEMENT LEAD - REFERENCE FORM
21. ATTACHMENT 17.19: LEAD SECURITY ANALYST - QUALIFICATIONS FORM
22. ATTACHMENT 17.20: LEAD SECURITY ANALYST - REFERENCE FORM
23. ATTACHMENT 17.21: SOLUTION OPERATIONS LEAD - QUALIFICATIONS FORM
24. ATTACHMENT 17.22: SOLUTION OPERATIONS LEAD - REFERENCE FORM
25. ATTACHMENT 17.23: ENGAGEMENT MANAGER - QUALIFICATIONS FORM
26. ATTACHMENT 17.24: ENGAGEMENT MANAGER - REFERENCE FORM
27. ATTACHMENT 17.25: ORGANIZATIONAL CHANGE MANAGEMENT LEAD - QUALIFICATIONS FORM
28. ATTACHMENT 17.26: ORGANIZATIONAL CHANGE MANAGEMENT LEAD - REFERENCE FORM
29. ATTACHMENT 17.27: COMMUNICATIONS LEAD - QUALIFICATIONS FORM
30. ATTACHMENT 17.28: COMMUNICATIONS LEAD - REFERENCE FORM
31. ATTACHMENT 17.29: DEVELOPER - QUALIFICATIONS FORM
32. ATTACHMENT 17.30: DEVELOPER - REFERENCE FORM
33. ATTACHMENT 17.31: QUALITY ASSURANCE TESTER - QUALIFICATIONS FORM
34. ATTACHMENT 17.32: QUALITY ASSURANCE TESTER - REFERENCE FORM
35. ATTACHMENT 18: NARRATIVE RESPONSE
36. EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS
37. EXHIBIT D: DELIVERABLES TABLE

5.6.2. VOLUME 2: COST

This volume must be in a separately marked file containing: EXHIBIT C: COST WORKSHEETS.

6. EVALUATION

This section presents the evaluation process and scoring procedures the State will follow to evaluate proposals submitted in response to this solicitation. The evaluation process is a multi-step review of each Bidder's proposal to determine if the Bidder is responsive and responsible, and whether its proposal 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 Officer from CDT OSTP (refer to [SECTION 2.2.1. PROCUREMENT OFFICER](#)). The Procurement Officer 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 the California Department of Public Health management and staff to review and evaluate proposals. The State Procurement Officer 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. EVALUATION STEPS

6.2.1. EVALUATION OF REQUIRED INFORMATION AND REQUIREMENTS

Proposals must be complete and meet all format and submission requirements as identified in [SECTION 5. PROPOSAL/BID FORMAT AND SUBMISSION REQUIREMENTS](#). The proposal may be rejected if it is conditional or incomplete, contradicts the requirements, contains any alterations of form, or contains other irregularities of any kind, including alterations to any terms and conditions.

6.2.2. MANDATORY REQUIREMENTS EVALUATION

The State will review each proposal to determine its compliance with all the requirements set forth in [SECTION 3. ADMINISTRATIVE REQUIREMENTS](#) and [SECTION 3.3. QUALIFICATION REQUIREMENTS](#).

The evaluation team will evaluate and score each submitted proposal by consensus for compliance with the requirements designated in [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#) and [SECTION 3.3. QUALIFICATION REQUIREMENTS](#). If a proposal fails to meet any requirement specified in [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#), and [SECTION 3.3. QUALIFICATION REQUIREMENTS](#), the State will determine if the deviation is material.

6.2.3. VALIDATION AGAINST REQUIREMENTS

The State will check 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 that 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 non-responsive.

6.3. PROPOSAL EVALUATION

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

Proposals will be based on compliance with all requirements, with points allocated fifty percent (50%) for scored administrative, qualifications, and solution requirements. The remaining fifty percent (50%) will be allocated for Cost. The evaluation methodology and distribution and allocation of maximum points possible for each proposal component is provided in Table 6.3-1: 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 two thousand one-hundred and sixty (2,160) points available (1,080.00 non-cost points, and 1,080.00 cost points), excluding preferences and incentives. All point calculations will be rounded to the nearest hundredth (two (2) decimal places).

Table 6.3-1: Evaluation Scoring and Point Distribution

Maximum possible Scores for each Evaluation Area	
SECTION 3.2. ADMINISTRATIVE REQUIREMENTS	Pass/Fail
SECTION 3.3. QUALIFICATION REQUIREMENTS (Qualification and Solution Requirements)	Maximum Points 1080

Maximum possible Scores for each Evaluation Area	
Bidder Qualifications (M)	Pass/Fail
Bidder Qualifications (DS)	150
Bidder Reference Forms (M)	50
Key Staff Qualifications (M)	Pass/Fail
Key Staff Qualifications (DS)	230
Key Staff References (M)	50
EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS	Pass/Fail
Out-of-the-box Functional Requirements	100
EXHIBIT D: DELIVERABLES TABLE	Pass/Fail
ATTACHMENT 18: NARRATIVE RESPONSE	500
Preference/Incentive Points	Maximum Points
Maximum Small Business Preference Points (5%)	108
Maximum DVBE Incentive Points (5%)	108
Maximum TACPA Preference Points	TBD
SECTION 4. COST	Maximum Points 1080
EXHIBIT C: COST WORKSHEETS	1080

Maximum possible Scores for each Evaluation Area	
TOTAL	
Maximum Total Points (Without Preference Points Applied)	2,160
Maximum Total Points (With Maximum Preference Points Applied)	2,376

6.3.1. ERRORS IN THE 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.

1. If the Bidder's intent is clearly established based on review of the complete proposal submission, 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 with the opportunity through the process identified in [SECTION 6.2.3. VALIDATION AGAINST REQUIREMENTS](#) to validate the resulting correction.
3. It is absolutely essential that Bidders carefully review the cost elements in their proposals and BAFOs, since they will not have the option to correct errors after the time of submission.
4. The State may request clarification of items in the Bidder's response if the meaning is not clear to the State, utilizing the process identified in [Section 6. EVALUATION](#). Responses to requests for clarification must be confirmed in writing by the Bidder as instructed by the State's Procurement Officer at the time of the request.
5. In the event an ambiguity or discrepancy between any of the State's Solicitation documents is detected after the opening of bids, the State reserves the right to seek clarification and acceptance from the Bidder.
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 RFP. Should this occur, confidential discussions may be held with Bidders who are interested in continuing to be considered. 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 as modified by any addenda. The new proposals will be evaluated as required by [SECTION 6. EVALUATION](#).

6.3.2. 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 of areas that may render the proposal non-responsive to the requirements and provide Bidders with 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.

6.3.3. ADMINISTRATIVE REQUIREMENTS EVALUATION

All [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#) labeled with (M) are mandatory, except those Administrative Requirements in [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#) labeled with (O) are optional and Bidders are not required to respond. Review of the proposals will begin with ensuring that the Bidder has responded to all mandatory administrative requirements in [SECTION 3.2. 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 requirements specified in [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#) may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.3.4. QUALIFICATION REQUIREMENTS EVALUATION

All [SECTION 3.3. QUALIFICATION REQUIREMENTS](#) labeled with (M), (MS), and (MO) 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 requirements specified in [SECTION 3.3. QUALIFICATION REQUIREMENTS](#), it may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.3.4.1. BIDDER QUALIFICATIONS

The State will evaluate bidder qualifications using the information contained in the completed ATTACHMENT 15: BIDDER QUALIFICATIONS FORM and ATTACHMENT 16: BIDDER REFERENCE FORM for compliance with the mandatory requirements specified in +SECTION 3.3.1.1. BIDDER QUALIFICATIONS (M/DS).

The Bidder must provide for a minimum of one (1) project and a maximum of five (5) projects. The Bidder must submit one (1) completed Bidder qualification form for each of the projects cited. Bidders who do not return the required qualification forms shall be deemed non-responsive.

The State will also evaluate the Bidder qualifications and reference forms to ascertain whether the Bidder qualifies for any of the Desirable Scored (DS) experience points, in accordance with the criteria specified in ATTACHMENT 15: BIDDER QUALIFICATIONS FORM

If the State is unable to validate that the information supplied by the Bidder qualifies for (DS) experience points, no points will be awarded for such experience. Any desirable scored experience points awarded will be added to the Bidder's qualification score. Reference contacts listed on the attachments may be contacted to verify information provided by the Bidder.

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.

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 3.3. 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 meet 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.

6.3.4.2. BIDDER REFERENCES

The State will evaluate the Bidder's references using the information provided in each ATTACHMENT 16: BIDDER REFERENCE FORM. The Bidder must submit one (1) ATTACHMENT 16: BIDDER REFERENCE FORM for each project cited on ATTACHMENT 15: BIDDER QUALIFICATIONS FORM.

The purpose of the Bidder reference requirement is to provide the State with 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.

If the Bidder submits more than five project references, the evaluation team will only evaluate the first five in the submission. Each Bidder Reference Form must be dated by a reference contact who performed a management or supervisory role on the referenced project.

If the reference is a current CDPH employee, the Bidder must first contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#) to ensure the current State employee is not a member of the solicitation's evaluation team or an CAB Online project team member. In addition, only one (1) reference from CDPH is permitted for each Bidder for this solicitation.

All reference forms must be returned with the proposal in order to meet the Bidder minimum experience requirements. Bidders who do not return the required reference forms shall be deemed non-responsive. 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.

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

The State may contact the Bidder references to validate the reference submitted. The State will make two (2) attempts via email to validate Bidder experience using the information provided in the Bidder and/or staff reference forms, as applicable.

References may be contacted to validate submitted responses based on customer satisfaction in accordance with [SECTION 7](#). 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 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.

Reference Scores for the bidder are calculated by the State by totaling the Satisfaction Ratings from each reference form (5 references max) and then dividing that total by the number of reference forms (5 references max) submitted. This determines the Average Reference Rating Factor, which is then multiplied by the total number of points available (50). This results in the Bidder Reference Score.

Example: The Bidder receives five (5) references. Each reference provides a score of 3 (0–3 are the reference options) for all the reference questions. This provides a Bidder's reference score of 30 per reference out of 30 possible, giving a reference rating factor of 1.0. Due to all five references providing the same score, the average reference rating factor is 1.0. This 1.0 is then multiplied by the fifty (50) points available, and the bidder receives a score of 50.

6.3.4.3. KEY STAFF QUALIFICATIONS

For each key staff, the evaluation team will first evaluate the completed Staff Qualification Form for compliance with the mandatory requirements specified in +SECTION 3.3.1.3. KEY STAFF QUALIFICATIONS (M)(DS). The State will evaluate the Bidder's key staff experience using the information provided in ATTACHMENT 17.1 through 17.31 (odd numbers). The State will evaluate Key Staff experience and award points as applicable using the Bidder's response to the mandatory and desirable requirements. The State will validate claimed experience on the associated Staff Reference Form for each requirement.

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.

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.

6.3.4.4. KEY STAFF REFERENCES

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 or supervisory 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 that 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 that 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.

The State will evaluate the Bidder's key staff references using the information provided on each key staff member's submitted in ATTACHMENT 17.2 through 17.32. The Bidder must submit one (1) reference form for every project cited on the staff member's ATTACHMENT 17.1 through 17.31, up to a maximum of five (5) projects. If the Bidder submits more than five (5) projects for a staff member, the Evaluation Team will only evaluate the first five (5) in the submission.

If the reference is a current CDPH employee, the Bidder must first contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#) to ensure the current State employee is not a member of the solicitation's evaluation team or a CAB Online project team member. In addition, only one (1) reference from CDPH is permitted for each key staff member for this solicitation.

Reference Scores for each key staff are calculated by the State by totaling the Satisfaction Rating from each reference form (5 references max) and then dividing that total by the number of reference forms (5 references max) submitted. This determines the average reference rating factor, which is then multiplied by the total number of points available for that key staff role. This results in the Key Staff Reference Score for that role. There is a total of 50 points available for all the key staff references. Example: The key staff Project Manager role receives five (5) references. Each reference provides a score of 3 (0–3 are the reference options) for all the reference questions. This provides a PM reference score of 27 per reference out of 27 possible, giving a reference rating factor of 1.0. Due to all five references providing the same

score, the average reference rating factor is 1.0. This 1.0 is then multiplied by the PM Reference Points available, which is 4, and the vendor receives a PM Reference Score of 4.

References that have a rating of "unsatisfactory" for ANY question or if a question is not answered, will result in that reference form having a 0 score for that reference form.

6.3.4.5. BIDDER AND STAFF REFERENCE CHECKS

If needed to verify either the Bidder or key staff's qualifications, the State will make two (2) attempts via email to the reference contact identified on the Bidder or Staff Reference Form, to validate the claimed information and experience. The Bidder should ensure that its reference 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 attempt, a second attempt will be made. If no response is received after the second attempt, the State will contact the Bidder and request that the Bidder assist the State by having the reference respond to the State within a 48-hour period from the second attempted contact. If the evaluators are still unable to contact the reference, the Bidder's proposal may be deemed non-responsive for failure to provide verifiable references, and the Bidder may be disqualified.

6.3.5. SOLUTION REQUIREMENTS EVALUATION

All [SECTION 3.4. SOLUTION REQUIREMENTS](#) labeled with (M), (MS), and (MO) are mandatory, whereas Solution 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 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 requirements specified in [SECTION 3.4. SOLUTION REQUIREMENTS](#), it may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.3.5.1. FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS

The functional and non-functional requirements identified in [EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#) consist of (M) and (MO) requirements. The Bidder must indicate their commitment to providing all functional and non-functional requirements as described in EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS by answering "Yes" to the question for EACH functional and nonfunctional requirement.

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 B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS

The State will evaluate each functional and non-functional requirement, including any reference materials to which the State is specifically directed for additional information to determine whether the response fully addresses the requirements in accordance with the following criteria:

- The Bidder's response to [EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#) is evaluated as a whole on a Pass/Fail basis. The evaluation team will review the Bidder's [EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#) and assess the Bidder's commitment to meet each requirement. If the Bidder responds "Yes" that it agrees to meet each requirement, they will score a "Pass." Any other response will cause the Bidder to score a "Fail" and be deemed non-responsive.
- In addition, there is a scored element to the Functional Requirements. For each detailed requirement, the Bidder must indicate whether its proposed solution meets each requirement Out-of-the-Box, which means the solution meets the requirement without the need for custom programming. Bidders will be awarded a percentage of the total points available for this scoring element equal to the percentage of the requirements that can be met Out-of-the-Box.

Failure to indicate if the Vendor agrees to meet the requirement (Column L) and if the solution will be out of the box (Column M) will be considered non-responsive and will be the basis for rejecting the Bidder's proposal.

The following provides a description of each column and the instructions for completing EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

- **Column A: Requirement Category** A reference number identifying the main business capability / function.
- **Column B: Requirement Number** A distinctive number for each requirement.
- **Column C: Main Business Capability/Function** The main business capability / function.
- **Column D: Sub Business Capability/Function** A sub-business capability / function.
- **Column E: Business Process** A business process that is going to be impacted by the

requirement.

The following business processes were defined as impacted by CAB Online:

1. Application Intake
2. Evaluation and Verification;
3. Issuance and Denial;
4. Account Management;
5. Corrective actions;
6. Revocations;
7. Reinstatement and Withdrawal;
8. Underlying technical capabilities, architecture and system upkeep.

- **Column F: Requirement** The detailed requirement.
- **Column G: Requirement Type** Business requirement refers to the immediate business need related to the requirement. Architecture requirements lay the foundation of the system in order to comply with current solution design principles. Functional requirement describe the actions expected to be performed by the system.
- **Column H: Priority** Requirement priority. Due to a shift to enterprise scale designs, all requirements have High priority because every requirement has an impact, direct or indirect, on the business objectives.
- **Column I: Business Owner/ Stakeholder** The entity within CDPH responsible for the requirement that has authority over determining the extent of requirement, respective acceptance criteria, its place within the scope of CAB Online and further clarification of the requirement.
- **Column J: Deliverable Type** specifies if the requirement is Mandatory or Mandatory Optional.
- **Column K: Anticipated Phase** The phase of the project the requirement is anticipated to be included.
- **Column L: Vendor Agrees to Meet Requirement** This is a drop-down selection with a Yes or No option. Vendor will select if they agree to meet the requirement.
- **Column M: Out of the Box Requirement / Solution** This is a drop-down selection with a Yes or No option. If the requirement will be met Out-of-the-Box select Yes which will create a % on the first tab titled A. FR Instructions.

6.3.5.2. DELIVERABLE EVALUATION (PASS/FAIL)

The State will evaluate the EXHIBIT D: 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 D: DELIVERABLES TABLE.

6.3.5.3. NARRATIVE RESPONSE(S) REQUIREMENTS

The Evaluation Team will review the responses to ATTACHMENT 18: NARRATIVE RESPONSE. The maximum total points achievable for Narrative Response requirements is 500.

Evaluation Components	Max Points Available (500)
Narrative 1: Project Management (50 points)	
Describes an approach to managing the project, including tools and methodologies for planning, monitoring, controlling, reporting and managing the project.	10
Describes an approach for tracking cost.	10
The Bidder must provide a Project Schedule with visual representation that identifies development stages and key milestones. The Project Schedule must include an accompanying description that addresses assumptions, constraints, and how the Bidder will respond to schedule deviations and ensure that the project meets required milestones and deadlines.	10
Describes how risks, issues, action items, and decisions will be captured, evaluated, and addressed.	10
Describes the plan to maintain clear and consistent communication with all the stakeholders	10
Narrative 2: Development Approach (110 points)	
Describe the Agile development approach and development process, including the use of sprints, tools to maintain and manage the CAB Online product and sprint backlog, the backlog refinement process, number of proposed sprints and sprint durations, sprint retrospectives, and system functionality included with each deployment.	25
Describes an approach to validate the CAB Online requirements, develop and refine user stories, and work with CDPH stakeholders throughout the development process.	25

Evaluation Components	Max Points Available (500)
With CAB Online planned to be built on top of GACH-APH, describes an approach to conduct a crosswalk analysis that would identify gaps between GACH-APH and CAB Online. Also, describe how the functionalities on both systems will be maintained on par and that there will be no functionality deficiencies in either of the systems.	25
Details the approach to software configuration management.	10
Provide the proposed Architecture diagram that supports the CAB Online vision.	25
Narrative 3: Testing Approach (60 points)	
Describes how they would manage testing activities throughout the CAB Online project with regard to the software development lifecycle (SDLC). This includes the approach to integration, regression, and user acceptance testing.	15
Describes a testing approach during three phased releases.	15
Identify any automated testing tools used to manage the testing process.	10
In addition to providing the overall and individual testing approaches, the address the following: Roles and Responsibilities Test Environment Management Test data and Parameters Test and defect Metrics	20
Narrative 4: Security, Compliance & Risk Mitigation (70 points)	
Describes an approach to security, including its approach to data security, prevention, monitoring, and detection.	30
Describes the responsibilities around security risk assessment and management.	20
Describes how the proposed solution can be easily updated for security improvements.	20
Narrative 5: Implementation and Go-Live (80 points)	
Describes the proposal to transition the CAB Online from development to production,	20

Evaluation Components	Max Points Available (500)
through ongoing production operations support, that will be applicable to all the three phases of roll-out. The description details the system transition plans, including system/ environment set-up, interface and integration point transition, Go/No Go criteria and other key production readiness activities.	
Describes and approach to complete an operational readiness assessment and demonstrate to CDPH that the solution is operationally ready to deploy to production.	15
Describes an approach to organizational change management for CDPH and external CAB Online stakeholders to facilitate system adoption and use.	15
Describes an approach to operational recovery to revert functionality back should any part of CAB Online functionality fail during production deployment.	10
Explains any assumptions and constraints regarding implementation and Go Live, if applicable.	5
Describes the post-implementation validation strategy.	15
Narrative 6: Training and Knowledge Transfer (90 points)	
Describes an approach to develop and deliver training and knowledge transfer to CAB Online end users, CDPH administrative users, help desk support team staff, and CAB Online technical administrators.	20
Describes the types of training that will be conducted, which must include the below: Train the Trainer One on one Train the CAB Online CDPH team Recorded training sessions that can be shared with the facility users	20
Describes how it will ensure the training audience understanding, following training delivery. The response describes the identification of user roles, proposed quantity and length of training sessions, and topics for each role.	10

Evaluation Components	Max Points Available (500)
Provides a proposed training schedule and describe its approach to creating training documents and materials.	20
Describes the user guides, both Technical and Non-Technical, for all the three phases.	20
Narrative 7: Solution Stabilization and System Acceptance (40 points)	
Describes an approach to achieve stabilization and to demonstrate to the State that the CAB Online solution is stable and meets the functional and non-functional requirements defined in EXHIBIT B: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.	10
Describe the process for maintenance and operations.	5
Response addresses ongoing production operation team structure, assigned support resources, prioritization of defects, the planned defect management and resolution process, and ongoing release management approach during the stabilization period.	10
Identifies any tools and processes used to detect and resolve system-related issues and errors.	5
Describe an approach to project close-out activities and transition to the maintenance and operations period after Final System Acceptance.	10

Response Rating	Percent of Points Awarded	Description
Excellent (E)	100%	• The response addresses all bullet points. • The response demonstrates Bidder's complete understanding of, knowledge of, and experience with the elements being evaluated. • The response is well-thought-out and planned, addresses every element requested, and may address more. • The response is clear and comprehensive, with no gaps, inconsistencies, or ambiguities, raising no unanswered questions.

Response Rating	Percent of Points Awarded	Description
Satisfactory (S)	75%	- The response mostly addresses all bullet points. - The response demonstrates that the Bidder understands and has sufficient knowledge of and experience with the elements being evaluated to be able to apply those skills on the CAB Online Project satisfactorily. - The response demonstrates sufficient thought and planning, and addresses most, if not all, elements. - The response is understandable but not thorough and may leave some gaps or have ambiguities.
Poor (P)	25%	- The response does not address all bullet points. - The response indicates the Bidder has minimal understanding of the element being evaluated and any application to CAB Online would be insufficient. - The response does little more than restate the requirement. - The response is not well-written, is not clear, or leaves many gaps and ambiguities.
Does Not Meet Requirement (D)	0%	- The response does not address all bullet points. - The Bidder did not respond to the criteria OR response indicates that the Bidder has no understanding of the element being evaluated and would not be able to apply it to CAB Online. - The response instills no confidence that the Bidder could deliver this component.

6.3.6. CALCULATE BIDDER PROPOSAL NON-COST SCORE

The Bidder proposal non-cost score is the sum of the Bidder's qualification requirements score plus the bidder's solution requirements score from the bidder's proposal. The table below is an illustration of this

process.

Table 6.3.6.1-1

Bidder Proposal Non-Cost Score Calculation			
Bidder	Hypothetical Qualifications Requirements Score	Hypothetical Bidder Solution Requirements Score	Hypothetical Bidder Proposal Score Summation
A	150 points	750 points	900 points
B	175 points	775 points	950 points
C	100 points	650 points	750 points

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

6.3.7. 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 to be 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 fifty percent (50%) 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. Each Bidder's cost information must be submitted 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 EXHIBIT C: COST WORKSHEETS may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.3.7.1. 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 6.3.1. ERRORS IN THE PROPOSAL](#).

After cost worksheets/workbooks have been verified for accuracy, the Bidder with the lowest proposed total cost will receive the maximum score of 1080 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 points of 1080, as shown in the Bidder cost score formula Table 6.3.7-1 below:

Table 6.3.7-1

Bidder Cost Score Formula	
(Lowest proposed total cost)	X 1080 points = Bidder cost score
(Bidder’s proposed total cost)	

The total evaluated cost score calculation example in Table 6.3.7-2, Bidder Cost Score Calculation example, illustrates that Bidder C proposed the lowest cost and received the maximum points possible. Bidders A and B received Cost Scores that correspond to the proportion of their Cost to the lowest Bidder Cost.

Table 6.3.7-2

Bidder Cost Score Calculation				
Bidder	Bidder's Proposed Total Cost	Calculation		Bidder Cost Score
A	\$500,000	\$300,000	X 1080 points	648 points
		\$500,000		
B	\$400,000	\$300,000	X 1080 points	810 points
		\$400,000		
C	\$300,000	\$300,000	X 1080 points	1080 points
		\$300,000		

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

6.3.8. 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 6.3.8-1 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 6.3.8-1, Example of Bidder Total Proposal Score Calculation.

Table 6.3.8-1: 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.

6.3.8.1. TACPA PREFERENCE

The State will give preferences in accordance with the Government Code § 4530-4535.3, for bidders who are California home-based and who qualify for claimed preferences under the Target Area Contract Preference Act (TACPA) by computing 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 the 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 \$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 the TACPA preference accordingly. The TACPA preference does not apply when the worksite is fixed by the terms of the Contract.

6.3.8.2. SMALL BUSINESS PREFERENCE

The State will verify the Small Business/Non-Small Business preference claim and apply the five percent (5%) preference accordingly.

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 responsible and 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 responsible and 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 6.3.8.2-1, 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 $(1750.00 \text{ points}) \times (.05) = 87.5 \text{ points}$. Bidder A is a non-small business committing to subcontract at least 25% to a small business, so earns the non-small business preference points. Bidder B is a small business, so it earns small business preference points. 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 6.3.8.2-1 — Small Business Preference Points Calculation

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	1,500.00 pts	Yes	No	87.50 pts
B	1,700.00 pts	No	Yes	87.50 pts
C	1,750.00 pts	No	No	0.00 pts

NOTE: Calculation is based on 5% of the Bidder with the highest “Bidder proposal score” which is a non-

small business. In the example table above, Bidder C has the highest non-small business score.

6.3.8.3. DVBE INCENTIVE

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 6.3.8.3-1 DVBE Participation Incentive Points.

The State will verify DVBE and apply the incentive accordingly. The DVBE Incentive points are a percentage of the total possible points (2,160 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. The table below is an illustration of this calculation:

Table 6.3.8.3-1 - DVBE Participation Incentive Formula

DVBE PARTICIPATION INCENTIVE FORMULA		
Confirmed DVBE Participation	DVBE Incentive Percentage	DVBE Incentive Points*
≥ 5%	5%	108.00 (2,160 x .05)
4% - 4.99%	4%	86.40 (2,160 x .04)
3.1% - 3.99%	3%	64.80 (2,160 x .03)
<3%	0%	0.00

6.3.9. BIDDER FINAL SCORE CALCULATION AND RANK DETERMINATION

The Evaluation Team will calculate the Bidder's final score. Table 6.3.9-1, Bidder Final Score Calculation example, illustrates the Bidder's final score, which incorporates both preference and incentive points:

Table 6.3.9-1 Bidder Final Score Calculation and Rank Determination

Bidder Final Score Calculation					
Bidder	Bidder Total Proposal Score	Small Business Preference Points Awarded	Verified DVBE %	DVBE Incentive Points Awarded	Bidder Final Score

Bidder Final Score Calculation					
A	1500.00 pts	87.50 pts	3%	64.8 pts	1652.30 pts
B	1700.00 pts	87.50 pts	4%	86.4 pts	1873.90 pts
C	1750.00 pts	0.00 pts	5%	108.00 pts	1858.00 pts

NOTE: Bidder final score calculation in Table 6.3.9-1 is an example that explains the calculations and has no other significance.

6.3.10. SUBMISSION OF AMENDED FINAL PROPOSAL(S)

The State may require submission of an amended proposal(s) incorporating any revisions made through the bid clarification process.

7. NEGOTIATIONS

This solicitation is being conducted under the authority of CDT pursuant to 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.

This Solicitation will utilize a competitive negotiation process to achieve the following goals:

- Ensure the Bidders can demonstrate they can meet the State's requirements
- Ensure the State clearly understands how the Bidder intends to meet the requirements before Bidder submissions are finalized
- Provide Bidders the opportunity to discuss responses and to correct issues or provide clarification

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. These negotiations may include bargaining, such as persuasion, and alteration of assumptions and positions.

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 a matter of the State's judgment.

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.

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

7.1. PROCEEDING TO NEGOTIATIONS

At the discretion of the State, the State may invite Bidder(s) to participate in the negotiation process under either of the following options:

Option 1

The State will invite and proceed with negotiations with the highest-scoring compliant Bidder and may award a Contract. If the State cannot come to an agreement with the highest-scoring compliant Bidder, the State will invite and proceed with negotiations with the next highest-scoring compliant Bidder. This Bidder negotiation selection process will continue until the State completes negotiations with the final selected Bidder.

Option 2:

The State will invite and proceed with negotiations with up to the top three (3) highest-scoring compliant Bidders.

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.

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.

7.2. NEGOTIATION INVITATION

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

1. The general purpose and scope of the negotiations;
2. The anticipated schedule for the negotiations;
3. The procedures to be followed for negotiations; and
4. Confirmation of negotiation attendance within two (2) business 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 establish a date and time for receipt of the BAFOs based on when the Bidder's BAFO negotiations occur. A Bidder's BAFO is an irrevocable offer for 180 calendar days following the scheduled date for submission of a final accepted BAFO. A Bidder may extend the offer in the event of a delay in Contract award.

BAFOs must be submitted electronically to the Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#), by the specific date and time that will be communicated to each Bidder individually in writing.

The BAFO submission must address the following:

1. A supplemental proposal containing all negotiated/revised section(s) of the Bidder's original proposal, any other revised area specifically required by the State to be included in the BAFO, and

revisions made necessary in accordance therewith.

2. The supplemental proposal must include all changes made to negotiated section(s) of the Bidder's original proposal in tracked changes. Changes to the Bidder's original proposal that are not tracked in the supplemental proposal or otherwise identified may result in rejection of the proposal or cause for termination of the Contract.
3. An executive summary must accompany the supplemental proposal, identifying a list of all changes (other than non-substantive changes to formatting, punctuation and grammar) that have been made to the Bidder's original proposal. The Bidder must include and attest to the following statement within the Executive Summary:

"This Best and Final Offer (BAFO) is in response to *CAB-Online's RFP 25-10042* and the changes identified in this executive summary represent all changes made to {*Bidder's name*} proposal previously submitted to the State. Any substantive change not included in this list is non-operative, non-binding, and will not be considered a part of the {*Bidder's name*} BAFO."

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 the purposes of this solicitation's negotiations.

7.5. AWARD AND EXECUTION

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 written Notification of Award to all Bidders that have submitted a proposal in response to this solicitation. See [SECTION 2.3. KEY ACTION DATES](#) , for the anticipated date for the Notification of Award.

All aspects of the Bidder's proposal are confidential until after the issuance of the notification of award.

7.6. PROTESTS OF AWARD

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

writ of mandate will be Sacramento, California.

7.7. DEBRIEFING

A debriefing may be held within fifteen (15) 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.

8. INFORMATIONAL ATTACHMENTS

The following attachments to this solicitation are informational for use in the solicitation process and do not need to be submitted with the Bidder's proposal response. They can be found in [PART 2 - BIDDER RESPONSE](#):

1. ATTACHMENT 20: TEMPLATE FOR QUESTION SUBMITTAL. This attachment provides the format for a Bidder to submit questions regarding this solicitation.
2. ATTACHMENT 19: BIDDERS' LIBRARY
3. ATTACHMENT 21: SOLICITATION SUBMISSION CHECKLIST. This attachment references items to be submitted as part of the proposal submission, but is not guaranteed to include all necessary items.
4. ATTACHMENT 22: GLOSSARY OF TERMS. This attachment includes definitions, acronyms and abbreviations for terms used in the solicitation and in the SOW.