



Request For Proposal (RFP)

2026-11001

PART 1 – BIDDER INSTRUCTIONS

FOR

STATE TAX ADMINISTRATION RECORD SYSTEM (STARS) SOLUTION

June 5, 2026

Issued by:

STATE OF CALIFORNIA

State Board of Equalization

Part 1 of the solicitation 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 to the solicitation.

Part 2 of the solicitation contains all forms a Bidder must complete and return with its 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, 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 State Board of Equalization (BOE), this solicitation is being conducted under the authority of California Department of Technology (CDT) pursuant to Public Contract Code (PCC) §6611 which provides the authority to use a competitive negotiation process.

Pursuant to Government (Gov.) Code section 15570.28, the California Department of Tax and Fee Administration (CDTFA) shall provide BOE with administrative services relevant to this Contract. The CDTFA and BOE collectively shall be referred to as the “State”. The BOE and Contractor shall be referred to as the “Parties”.

This solicitation contains the instructions governing the requirements for fixed price deliverable-based proposals to be submitted by Bidders, the required format and materials Bidders must follow when responding to this solicitation, the requirements Bidders must meet to be eligible for consideration, and 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 23: GLOSSARY OF TERMS](#).

1.1. PURPOSE

The purpose of this Request For Proposal (hereinafter referred to as “solicitation”) is to obtain proposals from qualified Bidders to provide the State with Cloud-based, fully integrated tax administration system (hereinafter referred to as "STARS").

The Contract Award, if made, will be to a single Bidder to design, develop, and implement (DD&I) the STARS solution (hereinafter referred to as “the Solution”) in accordance with the methodology defined in [SECTION 6. EVALUATION](#).

1.2. BACKGROUND

Created in 1879 by a constitutional amendment, the BOE was initially responsible for ensuring that county property tax assessment practices are equal and uniform throughout California. Today, the BOE is constitutionally and statutorily responsible for the oversight of California's property tax system, as well as the Alcoholic Beverage Tax and the Tax on Insurers. By statutory mandate, the CDTFA, a separate government entity, provides administrative services to BOE, including Information Technology services.

This SOW defines the tasks needed to design, develop, implement, and maintain the STARS Solution. The SOW also establishes the State's and the Bidder's responsibilities for completing these tasks during the term of the Contract.

1.3. TERM OF CONTRACT

Effective upon approval of CDT, Office of Statewide Technology Procurement (OSTP), the base term of the Contract is two (2) years.

The State, at its sole discretion, may exercise its option to execute one (1), one (1) year extension for a maximum Contract term of three (3) years (includes Base Contract term plus optional extension). Should the State choose to exercise the optional extension, the Bidder will be notified in writing by the State at least 120 days in advance of the commencement of the option period. The extension will be effective upon execution by the Parties and approval by the CDT-OSTP.

The Contractor shall not be authorized to deliver goods or commence performance of services described in this Agreement 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 Agreement is of no effect unless approved by CDT and no work shall begin before full execution of the Agreement.

1.4. CURRENT AND PROPOSED ENVIRONMENTS

1.4.1. CURRENT ENVIRONMENT

The State-Assessed Board Roll process runs annually from March 1st to July 31st, with two (2) BOE teams (real property appraisers and auditor-appraisers) working simultaneously on their areas of expertise to produce the roll. BOE's real property appraisers utilize the mainframe throughout the year to input data on active land parcels valued annually. Between March 1st and July 31st, the real property appraisers have their permissions altered to 'read-only' to allow the auditor-appraisers to complete their portion of the Board Roll. During this period, the real property appraisers must enter their work product for active land parcel appraisals in a "holding" area of the mainframe, which is later uploaded to the primary mainframe screens on August 1st.

By March 1st of each year, all state assessees (taxpayers) file a paper property return containing financial data and information on multiple schedules, including a land change form. A typical return filed is 20-30 pages. However, some taxpayers' returns are a few hundred pages. For months, up to 50% of staff time is spent by BOE's auditor-appraisers manually entering the financial return data and information into a series of BOE-developed spreadsheet templates. At the same time, BOE's real property appraisers manually enter data from the tax return land change forms into the mainframe.

The current process requires multiple interactions between the mainframe and BOE prepared spreadsheets to produce a final total value for each taxpayer, which is then allocated to the counties in which the properties are located. For additional information regarding the business and technical process flow, State-Assessed Property Division (SAPD) technical process flow is as follows:

1. The Taxpayer tax return data is manually entered into BOE spreadsheets.
2. BOE land values are extracted from the mainframe and added to the BOE spreadsheets.
3. The Taxpayer's business property values and land values are combined to obtain the total value of each taxpayer's property.
4. The taxpayer's tangible property data is uploaded (one taxpayer at a time) to the mainframe.
5. Each taxpayer's Allocation Factor is calculated on individual spreadsheets using data printed from the mainframe (the numbers can only be calculated, and then revealed or seen by printing).
6. Each Allocation Factor is manually entered into the mainframe. (Note: For the five (5) largest Taxpayers, BOE calculates dozens of allocation factors, which are uploaded to the mainframe; for all other taxpayers, a single allocation factor is calculated and manually entered.)
7. Total Taxpayer Unitary Value (nonunitary property does not go through this allocation process) is multiplied by the Final Allocation Factor(s) to determine the Taxpayer assessed values allocated to each county.
8. Final allocated values are stored in the mainframe.
9. Once the final values are adopted (approved) by the elected Board, an assessment roll (Roll) is generated by the mainframe.
10. The Roll is broken into 58 parts (one for each county in CA) and each part is transmitted to the appropriate county auditor-controller's office (currently the Roll is transmitted in paper and .txt format via email).
11. The Roll is kept in hard copy (paper) form by BOE and any changes to it are made by hand.

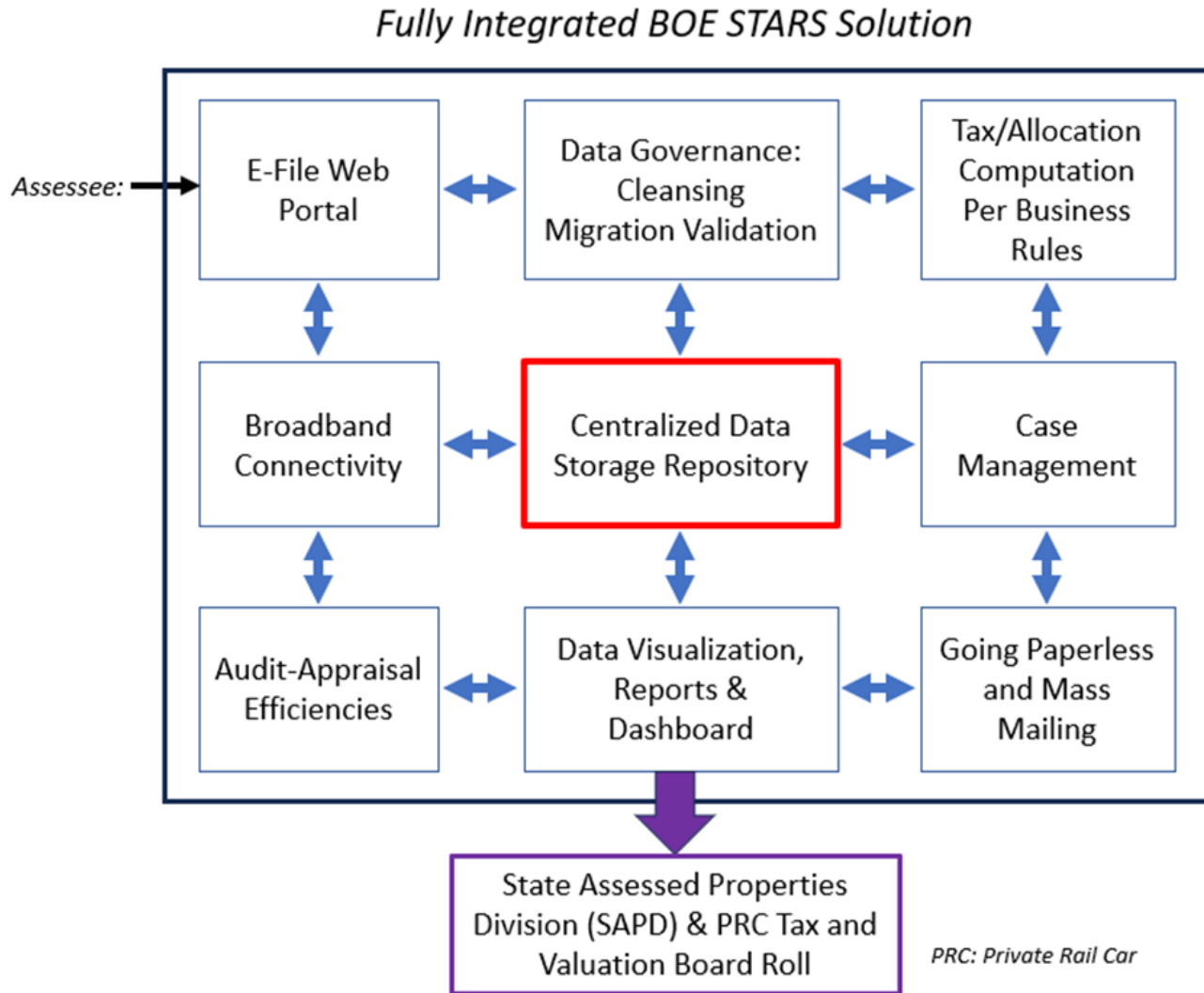
1.4.2. PROPOSED ENVIRONMENT

This section is intended to present an overview of the proposed system and as such will not specify any detailed technical requirements. A more detailed description of the proposed environment and overall project requirements for STARS are included in [EXHIBIT A: STATEMENT OF WORK](#). Details of the solicitation requirements are included in [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#).

The State is seeking a Contractor to set up an enterprise cloud hybrid solution comprising MOTS (Modifiable Off-the-Shelf), COTS (Commercial Off-the-Shelf), and custom software to create a fully integrated tax administration system. The Contractor shall include a combination of COTS, MOTS, and custom software coding to implement the STARS solution. The amount of code editing and modification required for the MOTS or COTS software modules is at the Contractor's discretion. Custom software coding will be needed where MOTS or COTS software cannot satisfy the project requirements to deliver

the BOE solution in full, as illustrated:

Figure 1.4.2-1: Conceptual Fully Integrated STARS Solution



The new proposed system will comprise the following functional blocks to perform key functions for the tax administration:

Table 1.4.2-1: Functional Blocks

Functional Block	Intended High-Level Purpose
Assessee/Customer e-File Web Portal	- Assessee/Customer service web account to do BOE business - Provide an easy means to file tax schedules and forms via uploads or manual entry

Functional Block	Intended High-Level Purpose
Board Roll and PRC valuation and tax computation per Industry Type by business rules	• Perform tax and valuation computations as the assessee files their tax schedules and forms
Case Management	• Provide better service for the assessee account • Research the assessee account as needed for business purposes • Send communications to the assessee
Going Paperless, Mass Paper Mailing, and e-Mailing	• Reduce paper in the tax filing process • Reduce USPS paper letter mailing • Save postage, paper, and printing expenses
Data Governance Implementation	• Facilitate Data Migration • Guide Data Validation & Cleansing • Metadata Strategy Implementation • Institute Data Catalog • Implement BOE Data Policy
Ad hoc Report Generation and Dashboarding (tasks and workflows)	• Generate the tax “Board Roll” • Create reports • Create letters • Track tasks and workflow progress • Dashboard BOE KPI's (Key Performance Indicators)
Architected Centralized Storage	• Provide a centralized data and file storage of all of the BOE tax administration needs • Be able to search for any account data needed • Have scalable storage
Broadband Connectivity for Real Property Field Work	• Provide a convenient means for BOE field auditors and appraisers to upload land pictures and notes via their cellular phones to the STARS solution for the account
Appraisals/Audits Efficiencies	• Speed up audit and appraisal work • Improve accuracy (reduce errors) • Manage audit and appraisal assignments and respective property parcels • Create a new Parcel/Map "Indexing/grouping" System Into Work Assignments

1.5. AMERICANS WITH DISABILITIES ACT (ADA)

To comply with the nondiscrimination requirements of the 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, potential Bidders may contact the Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#). You may also contact the State of California at the telephone numbers listed below.

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

Table 1.5-1: The California Relay Service Telephone Numbers

RELAY SERVICE DESCRIPTION	LANGUAGE	TELEPHONE NUMBER
TTY/VCO/HCO to Voice	English	1-800-735-2929
	Spanish	1-800-855-3000
Voice to TTY/VCO/HCO	English	1-800-735-2922
	Spanish	1-800-855-3000
From or to Speech-to-Speech	English & Spanish	1-800-854-7784

2. BIDDING INSTRUCTIONS

2.1. BIDDER ADMONISHMENT

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

The Bidder should refer to [SECTION 2.5. BIDDING STEPS](#) to understand the phases applicable to this solicitation and [SECTION 6. EVALUATION](#) to understand the evaluation process 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.ca.gov.

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 and is the sole point of contact.

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

Table 2.2.1-1: Procurement Officers

DESCRIPTION	CONTACT INFORMATION
Department Name:	California Department of Technology, Office Statewide Technology Procurement (OSTP)
Procurement Officer:	Athena Pennington
Email:	Athena.Pennington@state.ca.gov
Phone:	916-460-9814
Secondary Procurement Officer:	Will Gee

Email:	Will.Gee@state.ca.gov
Phone:	916-477-3471

2.2.2. QUESTIONS REGARDING THE SOLICITATION

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

If the Bidder believes that one or more of the solicitation requirements is onerous, unfair, or imposes unnecessary constraints on the Bidder proposing a less costly or an alternate solution, the Bidder may request a change to the solicitation by submitting, in writing, the recommended change(s) and the facts substantiating this belief and reasons for making the recommended change using [ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL/REQUEST FOR CHANGES](#). Such a request must be submitted to the Procurement Officers by the date specified in [SECTION 2.3. KEY ACTION DATES](#).

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

If a Bidder desires clarification or further information on the content of the solicitation, but whose questions relate to 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 this solicitation should submit a completed [ATTACHMENT 2: INTENT](#)

[TO BID FORM](#) by the date specified in [SECTION 2.3. KEY ACTION DATES](#).

This document shall be sent by email to the Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT 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.

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

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

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 and Volume 2.

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

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

VOLUME 2-COST:

1. The Bidder Contacts will be required to upload a complete copy of the Bidder's [EXHIBIT E: COST WORKBOOK](#) in the Volume 2 folder.
2. The Bidder's [EXHIBIT E: COST WORKBOOK](#) file shall be titled with the [Bidder's Name] and Project Name -BOE 2026-11001- [EXHIBIT E: COST WORKBOOK](#) and deposited in the folder

labeled "Volume 2".

3. The Bidder's cost workbook shall be in MS Excel format (version 2019 or higher).
4. Prior to submission, Bidders MUST apply an encryption password to the cost workbook.
5. The Bidder will be required to email the encryption password to the Procurement Officer and Secondary Procurement Officer at the same time the Bidder uploads their cost workbook.

If a file is uploaded in error to a file-sharing site folder, the Bidder may submit a request by email to the Procurement Officer prior to the last day and time 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.

2.2.5. 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 STARS. It is each Bidder's responsibility to check frequently for updates to the Bidders' Library. The Bidders' Library is accessible using the following URL: <https://www.boe.ca.gov/proptaxes/bidderslibrary.htm>.

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

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

2.3. KEY ACTION DATES

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

Table 2.3-1: Key Action Dates (KAD)

ITEM	ACTION	DATE AND TIME
1.	Release of Solicitation	June 5, 2026;
2.	Last day to submit questions and request for changes prior to final proposal using ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL/REQUEST FOR CHANGES	June 23, 2026; 5:00 PM PT
3.	State's response to Bidder's questions, and release of potential addendum ¹	July 16, 2026; 5:00 PM PT
4.	Submit: ATTACHMENT 2: INTENT TO BID FORM and ATTACHMENT 6: CONFIDENTIALITY STATEMENT FORM	July 16, 2026; 5:00 PM PT
5.	Last Day for Bidders to request an invitation to the State's file-sharing site to submit a proposal (Refer to SECTION 2.2.4. REQUEST INVITATION TO STATE'S FILE-SHARING SITE)	July 30, 2026; 5:00 PM PT
6.	Last day to submit Final Proposal (including EXHIBIT E: COST WORKBOOK and be deemed eVAQ approved by OSTP ²	August 10, 2026; 5:00 PM PT
7.	Final Proposal Evaluation Period	August 11, 2026 - October 27, 2026; 3:00 PM PT
8.	Notification of Award and Contract Execution	Contract Execution November 20, 2026; 5:00 PM PT

9.	Contract Start	November 30, 2026
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¹ Or five (5) working days following the last addendum that changes the requirements of the solicitation.

² If Bidder does not have an approved eVAQ application on file with OSTP, it is recommended that Bidders allow a minimum of four (4) weeks prior to the final proposal due date for the State to process and approve Bidder's eVAQ application.

2.4. RULES GOVERNING COMPETITION

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

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 2.4.8. ADDENDA](#).

2.4.3. EXAMINATION OF THE WORK

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

2.4.4. EXCLUSION FOR CONFLICT OF INTEREST

No consultant shall be paid out of State funds for developing recommendations on the acquisition of IT products or services or assisting in the preparation of the project approval lifecycle 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 project approval lifecycle 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 products if that consultant would directly and/or materially benefit from State adoption of such recommendations.

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

The Bidder must complete and submit [ATTACHMENT 3: FOLLOW-ON CONTRACT DISCLOSURE FORM](#) with its final proposal.

2.4.5. CONFIDENTIALITY

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

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

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

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

2.4.6. BONDS

The State reserves the right to require a performance bond or other security document as specified in the solicitation from the Bidder in an amount not to exceed the amount of the Contract. In the event the State requires a surety bond that has not been expressly required by the solicitation, the State will reimburse the Bidder as an addition to the purchase price in an amount not exceeding the standard premium on such bond.

2.4.7. JOINT BIDS

Joint bids are not allowed for this solicitation.

2.4.8. ADDENDA

The State may modify the solicitation at any time prior to submission of proposals by issuing an addendum. Addenda will be numbered consecutively and released to all Bidders via Cal eProcure. Any addenda during the negotiations phase of the procurement will only be released to the Bidders who are invited to negotiations.

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

2.4.9. COST FOR DEVELOPING PROPOSAL

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

2.4.10. SIGNATURE OF PROPOSAL

The Bidder must submit [ATTACHMENT 4: COVER LETTER](#) which must be signed by an individual who is authorized to bind the bidding firm contractually. The signature block must indicate the title that the individual holds in the firm.

2.4.11. IRREVOCABLE OFFER

Bidder's response to this solicitation shall constitute a firm offer, which shall remain irrevocable for not less than 120 calendar days following the contract award date specified in [SECTION 2.3. KEY ACTION DATES](#). In the event of a delay in contract award, a Bidder may extend the expiration date of its firm offer an additional 30 calendar days by written notice to the State.

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

2.4.12. 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, may be the basis for rejecting the Bidder's proposal and ruling the Bidder ineligible to further participate.

2.5. BIDDING STEPS

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

The Bidder is expected to follow the format requirements and utilize all forms included in this solicitation necessary for its response. This solicitation also addresses the Bidder responsibilities and requirements it must meet to be eligible for consideration. If the Bidder fails to follow the provided instructions, the Bidder may be disqualified from the solicitation process.

This solicitation will follow a phased approach as indicated below to ensure contract award. Refer to [SECTION 2.3. KEY ACTION DATES](#) to determine which phases and mandatory steps are included in this solicitation. [SECTION 2.3. KEY ACTION DATES](#) lists milestones, mandatory steps, and due dates for deliverables in this solicitation.

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

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

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

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

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

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

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

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

Failure to have a CDT OSTP-approved eVAQ by the last day to submit Final Proposal (refer to [SECTION 2.3. KEY ACTION DATES](#)) will disqualify the bidders Final Proposal from being evaluated.

2.5.2. NEGOTIATIONS

The State will conduct negotiations under PCC § 6611 and as detailed in [SECTION 7. NEGOTIATIONS](#). The purpose of the negotiation process is to maximize the State's ability to obtain a value effective solution.

Following Proposal Rank Determination, described in [SECTION 6.7. PROPOSAL RANK DETERMINATION](#), the State will invite and proceed with negotiations with up to three responsive Bidders.

This Bidder negotiation selection process will continue until the State completes negotiations with the final selected Bidder. The negotiations may or may not result in a Contract award.

2.5.3. WITHDRAWAL AND RESUBMISSION/MODIFICATION OF PROPOSALS

A Bidder may withdraw its proposal at any time prior to the proposal submission due date of the relevant Phase by submitting a written notification of withdrawal signed by an authorized representative of the Bidder in accordance with [SECTION 3.2.1. COVER LETTER \(M\)](#). The Bidder may thereafter submit a new or modified proposal prior to the respective proposal submission date and time specified in [SECTION 2.3.](#)

KEY ACTION DATES. Modification offered in any other manner, oral or written, will not be considered. Other than as allowed by law, proposals cannot be changed after the respective deadline date and time designated for receipt, except as provided in the solicitation.

2.5.4. DISPOSITION OF PROPOSALS

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

2.5.5. FINAL PHASE

The final phase consists of a Final 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 Final Proposal is a mandatory step for all bidders.

The Final Proposal must be complete, and include all cost information, required signatures, and contract changes issued by the State via an addendum, if any. Bidders that submitted Final Proposals meeting the criteria identified in [SECTION 6.2. PROPOSAL EVALUATION](#) and [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.

3. PROPOSAL REQUIREMENTS

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

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

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

1. (M) Sections labeled as "Mandatory" or "M" are not negotiable. To be considered responsive to these requirements, all requirements identified as (M) must receive a response from the Bidder. Failure to respond to any (M) requirements where indicated shall result in a "fail" and disqualification of the proposal.
2. (MS) Sections labeled "Mandatory Scored" or "MS" are not negotiable. To be considered

responsive to these requirements, all requirements identified as (MS) must receive a response. Failure to respond to any (MS) requirement where indicated shall result in a “fail” and disqualification of the proposal. The State’s evaluation team will review responses to (MS) requirements and award points, if applicable, per criteria stated in [SECTION 6. EVALUATION](#).

3. (DS) Sections 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 of these (DS) requirements, the Bidder must meet the minimum requirements as stated in the section. The State will review responses to (DS) requirements and apply points, if applicable, per criteria stated in [SECTION 6. EVALUATION](#).

3.1. PREQUALIFICATION REQUIREMENTS

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

3.1.1. ELECTRONIC VENDOR APPLICATION OF QUALIFICATIONS (EVAQ)

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

The application can be accessed at 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.

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.

3.2. ADMINISTRATIVE REQUIREMENTS

This section contains the mandatory and optional administrative requirements that must be met in order to be considered responsive to this solicitation. Additional administrative requirements for this solicitation are being processed through the electronic Vendor Application of Qualifications (eVAQ). Please refer to [+SECTION 3.2.1. ELECTRONIC VENDOR APPLICATION OF QUALIFICATIONS \(eVAQ\)\(M\)](#) for more information.

3.2.1. COVER LETTER (M)

The Bidder must complete and submit [ATTACHMENT 4: COVER LETTER](#) with its 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.

3.2.2. ADMINISTRATION REQUIREMENTS DOCUMENT (M)

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

3.2.3. CONFIDENTIALITY STATEMENT (M)

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

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

The Bidder will also be required, upon Contract award, to submit a signed confidentiality statement from all personnel, agents, and subcontractors assigned to the awarded Contract.

3.2.4. ABILITY TO PERFORM

Prior to award of the Contract, the State must be assured that the Bidder selected has all of the resources to successfully perform under the Contract. This includes, but is not limited to, personnel in the quantity 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) working days to submit the information requested in writing. Examples of the type of financial responsibility information requested may include annual reports and current audited balance sheets for the Bidder's firm.

3.2.5. PRIMARY BIDDER

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

3.2.6. SUBCONTRACTORS

Nothing contained in the resulting Contract shall create any relationship between the State and any subcontractors, and no subcontract shall relieve the 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 Contractor to seek substitution and adhere to the DVBE participation level identified in the bid may be cause for Contract termination, recovery of damages under rights and remedies due to the State, and penalties as outlined in MVC, Section 999.9; Public Contract Code (PCC), Section 10115.10.

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

The Contractor's obligation to pay its subcontractors is an independent obligation from the State's obligation to pay or to enforce the payment of any money to any subcontractor. Contractor is solely responsible for any payments to or claims made by subcontractors.

3.2.6.1. BIDDER DECLARATION FORM (M)

The Bidder must complete and submit [ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105](#), with its 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 and submit [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

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 OSTP.

3.2.8. FINANCIAL RESPONSIBILITY INFORMATION

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

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

3.2.9. INCORPORATION OF EVAQ REQUIREMENTS AND REQUIREMENTS

The Contract awarded as a result of the solicitation shall automatically incorporate by reference all requirements of the solicitation and terms and conditions of the eVAQ. The Bidder hereby certifies that all information submitted in the eVAQ is true, correct and complete as of the date of submission, and that such information is incorporated herein by reference and made a part of this bid.

The Bidder's eVAQ shall remain in effect throughout the life of the Contract including all optional years.

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

3.2.10. GENERAL PROVISIONS

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

Per State's Cloud Smart Computing Policy, Agencies/State entities must first consider CDT Managed Cloud Services or CDT approved cloud service offerings. These service options include Software as a Service (SaaS), Platform as a Service (PaaS) and Infrastructure as a Service (IaaS). Refer to **EXHIBIT A: STATEMENT OF WORK, +SECTION 1. STATE DATA CENTER OR CONTRACTOR HOSTED FACILITY ENVIRONMENT** for specific hosting requirements for this solicitation.

3.2.11. GENERATIVE ARTIFICIAL INTELLIGENCE (GENAI) DISCLOSURE NOTIFICATION

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

Bidder must notify the State in writing if it: (1) intends to provide GenAI as a deliverable to the State; or (2), intends to utilize GenAI, including GenAI from third parties, to complete all or a portion of any deliverable that materially impacts: (i) functionality of a State system, (ii) risk to the State, or (iii) Contract performance. For avoidance of doubt, the term "materially impacts" shall have the meaning set forth in State Administrative Manual (SAM) [4986.2](#).

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

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

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

3.2.12. STATEMENT OF WORK

[EXHIBIT A: STATEMENT OF WORK](#) identifies and describes the tasks and responsibilities of the Contractor and the responsibilities of the State during the term of the Contract.

The Bidder is advised that deviations from the SOW may be the basis for rejection of the Bidder's proposal. Refer to Part 2, Bidder Response [EXHIBIT A: STATEMENT OF WORK](#).

3.2.12.1. INSURANCE COVERAGE

In accordance with +SECTION 1. INSURANCE REQUIREMENTS, the Contractor must furnish an 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.

3.2.13. PRODUCTIVE USE REQUIREMENTS

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

The proposed solution must include only equipment and off-the-shelf software that is currently supported by its manufacturer for at least the time specified in Table 3.2.14-1, Productive Use Timeframes. No equipment and/or software may be proposed, specified, or employed if the manufacturer has announced an end to support. The productive use requirements defined in this section do not apply to any portion of the custom software developed for the State or to modifications to custom software that was developed for the State under this Contract prior to submittal and throughout Contract duration.

3.2.13.1. 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;
2. For a paying customer external to the Bidder's organization; and
3. For at least the number of months shown in Table 3.2.14-1 below and prior to proposal submission.
4. Installation must have been completed at least the number of months shown in Table 3.2.14-1 below and prior to proposal submission.

Table 3.2.14-1: Productive Use Timeframes

PRODUCT	PROJECT COST	INSTALLATION
Category 1 - Critical Software Software that is required to control the overall operation of a computer system or peripheral equipment. Included in this category are operating systems, database management systems, language interpreters, assemblers and compilers, communications software, and other essential system software.	Less than \$10,000	1 month
	\$10,000 up to \$100,000	4 months
	More than \$100,000	8 months

PRODUCT	PROJECT COST	INSTALLATION
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	4 months
	More than \$100,000	6 months

The State has the option to request supporting evidence of compliance to the customer in-use requirements. Supporting evidence could include, but is not necessarily limited to, one (1) or more of the following:

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

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

3.2.14. 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

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

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

3.2.14.2. DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PROGRAM (O)

1. The DVBE Participation Program for state contracts in Public Contract Code, § 10115 et seq., Military and Veterans Code (MVC), § 999 et seq., and California Code of Regulations, Title 2, § 1896.60 et seq. Military and Veterans code Section 999.2 establishes a contract participation goal of at least three percent (3%) for DVBE.
2. A DVBE Incentive will be granted to bidders achieving DVBE Participation of one percent (1%) or more of their Bid total, in accordance with Military and Veterans Code, § 999.5(a) and (d), and California Code of Regulations §1896.98 et seq.
3. The DVBE Incentive will be applied during the Bid evaluation process and will only be applied to responsive Bids.

4. Bidders that achieve a DVBE Participation of one percent (3%) or more will have the DVBE Incentive applied to their Bid in an attempt to displace the apparent low Bidder. The percentage of DVBE Incentive will be equal to the percentage of DVBE participation, and subject to a minimum of one percent (3%) and a maximum of five percent (5%).
5. 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](#). The form is available at: https://www.documents.dgs.ca.gov/dgs/fmc/gsp/pd/pd_843.pdf

Information regarding the DVBE Program Requirements may be viewed at: <https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Apply-for-or-Re-apply-as-Small-Business-Disabled-Veteran-Business-Enterprise>

The Office of Small Business and DVBE Services offer program information and may be reached 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

3.2.14.2.1. 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 optional 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. The incentive is only given to those Bidders who are responsive to the DVBE program requirement and propose DVBE participation in the resulting Contract that exceeds the mandatory three percent (3%) requirement.

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

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

3.2.14.3. SMALL BUSINESS PREFERENCE (O)

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

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

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

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

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

3.2.14.4. NON-SMALL BUSINESS SUBCONTRACTOR PREFERENCE (O)

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

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

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

1. [ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105](#);
2. [ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES](#); and,

3. [ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION \(CUF\) CERTIFICATION](#).

3.2.14.5. COMMERCIALLY USEFUL FUNCTION (M, if applicable)

All certified small businesses, micro businesses, 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 and submit with its proposal an [ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION \(CUF\) CERTIFICATION](#) for each Small Business and/or DVBE (prime and/or subcontractor(s)). All Bidders and subcontractors identified in the proposal response to fulfill the requirements for one (1) or more of the socio-economic programs (DVBE and small business) must perform a commercially useful function (CUF) in the resulting Contract. CUF is defined pursuant to Military and Veterans Code §999(b)(5)(B) and Government Code §14837(d)(4)(A) for the DVBE and small business programs, respectively.

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

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

The TACPA preference does not apply when the worksite is fixed by the terms of the Contract. Therefore the TACPA preference is not applicable to this solicitation.

3.3. QUALIFICATION REQUIREMENTS

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

The Bidder must meet the minimum Bidder Qualification and Key Staff Qualification Requirements. Failure to meet any of the minimum requirements may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

3.3.1. BIDDER QUALIFICATIONS (M)

The Bidder must complete and submit as part of its proposal, [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#), to confirm that the Bidder's experience meets the minimum requirements identified in [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#). It is incumbent upon the Bidder to provide enough detail in its proposal to evaluate the Bidder's ability to meet the requirements and perform the services as described in this solicitation. Refer to [ATTACHMENT 12: BIDDER QUALIFICATIONS FORM - INSTRUCTIONS](#) for further requirements and instructions.

The Bidder must provide information for a minimum of two (2) projects. A separate [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#) must be submitted for every project used to meet the minimum required experience. Any given project may meet multiple requirements, but at least two (2) projects and not more than five (5) projects must be provided to meet the requirements in [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#). If more than five (5) Bidder Qualification Forms are submitted, only the first five (5) in the order presented in the proposal will be evaluated.

Unless stated otherwise, experience must have occurred within seven (7) years prior to the proposal due date for all projects and must have been completed in the United States of America. Points will be awarded based on desirable experience in accordance with [SECTION 6. EVALUATION](#).

3.3.2. BIDDER REFERENCES (M)(MS)

The Bidder must complete and submit as part of its proposal, [ATTACHMENT 14: BIDDER REFERENCE FORM](#) for each of the projects cited on the corresponding [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#).

The purpose of the Bidder reference requirement is to provide the State 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 14: BIDDER REFERENCE FORM](#) must be completed in its entirety and dated by a reference that performed a management or supervisory role on the referenced project to be considered responsive. The [ATTACHMENT 14: BIDDER REFERENCE FORM](#) must be returned to the Bidder for submission with the proposal. No information corrections or changes may be made on the reference form by the Bidder. Forms with alterations or changes to the entered information may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

References may be contacted to validate submitted responses based on customer satisfaction in accordance with [SECTION 6. EVALUATION](#). References must be external to a Bidder's organization and

corporate structure. Failure to provide verifiable references may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

References must meet the following criteria:

1. Must be from the company (customer) or Agency for which the project was developed and/or services provided.
2. Must be someone who performs a management or supervisory role on the referenced project.
3. Must be external to the Bidder's organization and corporate structure.
4. Must not be from employees or individuals who have or are currently working for the Bidder.
5. Amendments to contracts shall not be considered separate and distinct contracts and cannot be used as separate projects.
6. Must be able to provide an objective evaluation of the proposed Bidder and/or Key Staff's performance.

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

3.3.3. KEY STAFF QUALIFICATIONS (M)(MS)

The Bidder is fully responsible for all necessary staffing resources to successfully implement STARS within the agreed upon schedule and to perform to the standards set forth in the SOW: +SECTION 1. SERVICE LEVEL AGREEMENTS (SLAS). The Bidder's staff may be comprised of Contractor Key Staff, critical Non-Key Staff, and any other Non-Key Staff that the Bidder requires to implement the Solution. A minimum of two (2) 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 applicable Key Staff Qualifications forms as part of its proposal. The Bidder must provide complete information to confirm that each of the two (2) proposed Key Staff possess the experience and qualifications as specified for their project role. Refer to [ATTACHMENT 15: KEY STAFF QUALIFICATIONS FORM - INSTRUCTIONS](#) for further instructions.

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

The Bidder's proposed Key Staff must meet all the mandatory minimum qualification requirements. All

experience used to meet the minimum requirements must have occurred within the last seven (7) years prior to the proposal due date. The same resource cannot be assigned to meet multiple roles. Points will be awarded to Bidders that meet the criteria set forth in the desirable experience qualifications as specified in [SECTION 6. EVALUATION](#).

The following Key Staff are required to perform the services as described in [EXHIBIT A: STATEMENT OF WORK](#):

1. Project Manager
2. Technical Lead

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

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

To calculate and report the full-time month 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 equivalent experience the Staff’s work represents using the calculations previously described in this section, which depend upon the time period (calendar period) during which the Staff worked on the referenced project and whether he/she worked on a full-time or some other basis.

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

3.3.4. KEY STAFF REFERENCES (M)(MS)

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

The purpose of the Key Staff reference requirement is to provide the State the ability to evaluate the

proposed Key Staff's experience in providing similar or relevant services to other organizations through a satisfaction rating provided by the Key Staff's previous clients. The description of their projects must be detailed and comprehensive enough to permit the State to evaluate the work performed on the project meets the requirement(s).

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

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

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

References must meet the following criteria:

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

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

3.4. SOLUTION REQUIREMENTS

This section contains the solution requirements, which includes the detailed functional and non-functional requirements, deliverables and milestone requirements, and narrative response requirements pertaining to the proposed system that must be met to be considered responsive to this solicitation.

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

The Bidder must complete and submit as part of its proposal, [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#), following the instructions indicated below and in Table 3.4.1-1.

The Bidder must indicate compliance and confirmation to each of the requirements by marking “Yes” or “No” in the column labeled “Bidder Agrees to Meet? Yes/No.” A blank or “NO” answer in this column may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The Bidder must complete the Description as indicated for evaluation.

In preparing a response to the Description, do not simply restate or paraphrase information in this solicitation and the SOW. Describe or demonstrate, in the Bidder's own words, the information required below.

The Bidder must check one (1) of the boxes in Column I for each requirement showing whether the requirement will be met using MOTS, COTS, Custom Coding.

The response descriptions and explanations should be straightforward, detailed, and precise. Responses will be evaluated as stated in [SECTION 6. EVALUATION](#).

The following table provides a description of each column and the instructions for completing [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#):

Table 3.4.1-1: Description of Columns in Exhibit C

Item	Description	Instructions
Obj. Ref. (Obj. #)	STARS Business Objective Reference Number 1-11	Column A: Informational
Requirement Category	Mid-level Requirement	Column B: Informational
Requirement Number	Detailed Requirement number in the form of x.xx.x	Column C: Informational
Requirement	Description of the detailed requirement	Column D: Informational
Tax Program	Indicates which tax program is impacted by the requirement PRC: Private Railroad Car	Column E: Informational

	BR: State Assessed Properties Board Roll	
Priority	Describes the scoring utilized for the requirement.	Column F: Indicates how Bidder's proposal will be evaluated and the point value.
Bidder's Response	Bidder's response.	Column G: (Checking "Yes" agrees to completing and satisfying the requirement in its entirety; A "No" response may be considered non-responsive and may be the basis for rejecting the Bidder's proposal)
Bidder's Response to Mandatory Scored Requirements	Describes Bidder's response.	Column H: Bidder's narrative response.
How the Requirement Will Be Met	Drop down menu to indicate MOTS, COTS, or Custom Coding.	Column I: Select one choice per requirement using the drop down menu.
Main Business Capability/ Function	Describes the key component of Business Functionality needed.	Column J: Informational
Sub Business Capability/ Function	Additional detailed information regarding the functionality required.	Column K: Informational
Business Process	Information about the specific business process impacted by the requirement.	Column L: Informational
Requirement Type	Indication of Functional or Non-Functional type.	Column M: Informational
Business Owner/ Stakeholder	Indicates Business owner, which is State-	Column N: Informational

	Assessed Properties Division.	
Links to other Req. IDs	List the ID numbers of other requirements that are linked by functionality.	Column O: Informational
Classification (Mandatory/Optional)	Indicate if the requirement is mandatory or optional.	Column P: Informational
Design Doc Reference	Description of the architectural/design document linked to the requirement.	Column Q: Informational
Technical Spec Reference	Description of the technical specification linked to the requirement.	Column R: Informational
WBS Deliverables Reference	WBS deliverables linked to the requirement.	Column S: Informational
Test Cases Reference	The test case number linked to the functional requirement.	Column T: Informational
Tested In	The module/test environment the functional requirement has been.	Column U: Informational
Implemented In	Populate with the module/environment the functional requirements have been implemented in.	Column V: Informational
Status (Met Y/N?)	Populate with the current status of requirement development to determine if the requirement has been met or not.	Column W: Informational
Verification Date	Populate with the verification date of when the requirement was met.	Column X: Informational

The Bidder must not alter the structure or content of [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#).

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

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

3.4.2. DELIVERABLES AND MILESTONES TABLE (M)

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

The Bidder must not alter the structure or the content of [EXHIBIT D: DELIVERABLES AND MILESTONES TABLE](#).

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

3.4.3. NARRATIVE REQUIREMENTS (MS)

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

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

4. COST

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

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

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

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

4.1. COST WORKBOOK (MS)

The Bidder must submit a completed [EXHIBIT E: COST WORKBOOK](#) separately in Volume 2, as part of its proposal, in accordance with the requirements specified in this [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#).

Services, features, equipment, and costs included in the [EXHIBIT E: COST WORKBOOK](#) are those that the Bidder must provide for the term of the Agreement as identified in the [EXHIBIT A: STATEMENT OF WORK](#), which includes all optional years.

4.2. COST WORKBOOK INSTRUCTIONS

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

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

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

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

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

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

A detailed description of each worksheet is provided in the [EXHIBIT E: COST WORKBOOK](#).

- Tab 1: Worksheet 1, Instructions
- Tab 2: Worksheet 2, Cost Workbook Summary
- Tab 3: Worksheet 3, Deliverables
- Tab 4: Worksheet 4, Maintenance and Operations
- Tab 5: Unanticipated Costs

Refer to the [EXHIBIT E: COST WORKBOOK](#) for additional cost workbook instructions.

4.3. SALES TAX

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

5. PROPOSAL/BID FORMAT AND SUBMISSION REQUIREMENTS

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

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

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

5.1. PREPARATION

Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this solicitation document. High-definition graphics, multi-colored content, promotional materials, etc., are neither necessary nor desired. Emphasis should be 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 5.4.2. VOLUME 2: COST](#).

5.3. DELIVERY OF SUBMITTALS

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

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

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

It is highly recommended that Bidders upload a test MS Word, MS Excel, and PDF file to each folder at least five (5) calendar days prior to the due dates 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 proposals.

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 and Volume 2.

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

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

VOLUME 2-COST:

- The Bidder Contacts will be required to upload a complete copy of the Bidder's [EXHIBIT E: COST WORKBOOK](#) in the Cost folder.
- The Bidder's [EXHIBIT E: COST WORKBOOK](#) file shall be titled with the [Bidder's Name] and Project Name - *BOE-2026-11001-EXHIBIT E: COST WORKBOOK*, and deposited in the folder

labeled "Volume 2".

- The Bidder's Cost Workbook shall be in MS Excel format (version 2019 or higher).
- Prior to submission, Bidders MUST apply an encryption password to the Cost Workbook.
- The Bidder will be required to email the encryption password to the Procurement Officer and Secondary Procurement Officer at the same time the Bidder uploads their cost workbook.

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

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

5.4. PROPOSAL CONTENT AND STRUCTURE

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

1. Show the following on each page of the proposal:
 - a. Solicitation #
 - b. Name of Bidder
 - c. Attachment/Exhibit Number
 - d. Page number (Page # of ##)
2. Response components shall be submitted electronically using the Century Gothic or Arial typeface no smaller than twelve (12) points, with headers/footers and table/figures no smaller than ten (10) point font.
3. Documents must be formatted to fit, if printed, on 8.5" x 11" letter-size paper and have a perimeter margin no less than one-half inch (0.5").
4. Electronic copies of the proposals 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 of the Cost

Workbook. The inclusion of cost in any part of the proposal, except for within the Cost Workbook, may be the basis for rejection of the Bidder's proposal.

7. Bidders must ensure its proposal is submitted in the applicable file sharing site folder.
8. As stated in [SECTION 2.4.5. CONFIDENTIALITY](#), proposals marked "confidential" or "proprietary" may exclude the Bidder from consideration for award.

5.4.1. VOLUME 1: RESPONSE TO ADMINISTRATIVE AND TECHNICAL REQUIREMENTS

Volume 1 submission must contain the following in this order:

1. Table of Contents
2. [ATTACHMENT 2: INTENT TO BID FORM](#)
3. [ATTACHMENT 3: FOLLOW-ON CONTRACT DISCLOSURE FORM](#)
4. [ATTACHMENT 4: COVER LETTER](#)
5. [ATTACHMENT 5: RESPONSE TO ADMINISTRATIVE REQUIREMENTS FORM](#)
6. [ATTACHMENT 6: CONFIDENTIALITY STATEMENT FORM](#)
7. [ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105](#)
8. [ATTACHMENT 8: WORKERS' COMPENSATION CERTIFICATION :](#)
9. [ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES](#)
10. [ATTACHMENT 10: DVBE DECLARATIONS](#) (if applicable)
11. [ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION \(CUF\) CERTIFICATION](#) (if applicable)
12. [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#)
13. [ATTACHMENT 14: BIDDER REFERENCE FORM](#)
14. [ATTACHMENT 15.1: PROJECT MANAGER KEY STAFF QUALIFICATIONS FORM](#)
15. [ATTACHMENT 15.2: TECHNICAL LEAD KEY STAFF QUALIFICATIONS FORM](#)
16. [ATTACHMENT 16: KEY STAFF REFERENCE FORM](#)
17. [ATTACHMENT 17: NARRATIVE RESPONSE](#)
18. [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#)
19. [EXHIBIT D: DELIVERABLES AND MILESTONES TABLE](#)

5.4.2. VOLUME 2: COST

This volume must contain: [EXHIBIT E: COST WORKBOOK](#).

6. EVALUATION

This section details the evaluation process and scoring procedures the State will follow when evaluating

proposals submitted in response to this solicitation. The evaluation process is multi-step review of each Bidder's proposal response to determine that it is responsive and provides "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 BOE State employees only, including management and staff to review and evaluate proposals. The State Procurement Officers will provide guidance and oversight to the evaluation team. 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 individuals/SME do not have voting privileges or responsibility for the evaluation process and will serve solely in an advisory capacity.

6.2. PROPOSAL EVALUATION

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

Proposals will be based on compliance with all requirements, with points allocated sixty percent (60%) for scored solution, narratives, and experience requirements. The remaining forty percent (40%) will be allocated for Cost. The evaluation methodology and distribution and allocation of maximum points possible for each proposal component is provided in Table 6.2-1: 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 6,230 points available (3,738 non-cost points, and 2,492 cost points) excluding preferences and

incentives. All point calculations will be rounded to the nearest hundredth (two (2) decimal places).

Table 6.2-1: Evaluation Scoring and Point Distribution

REQUIREMENT	SCORING ELEMENT	SCORING METHOD	MAX SCORE
Administrative Requirements, eVAQ and Attachments 1-10	Mandatory	Pass/Fail	NA
Bidder Qualifications	Mandatory	Pass/Fail	NA
Bidder References	Mandatory	Pass/Fail	NA
Key Staff Qualifications	Mandatory	Pass/Fail	NA
Key Staff Qualifications	Desirable	Scored	30.00
Key Staff References	Mandatory	Pass/Fail	NA
Narrative Responses	Mandatory	Scored	2,781.00
Deliverables Requirements	Mandatory	Pass/Fail	NA
Functional and Non Functional Requirements	Mandatory	Scored	927.00
Cost Evaluation	Mandatory	Scored	2,492.00
TOTAL MAX SCORE			6,230.00

6.2.1. VALIDATION AGAINST REQUIREMENTS

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

During the proposal evaluation, the State may request the Bidder to clarify any area of the proposal that the State determines to be unclear in accordance with [SECTION 6.2.2.1. BIDDER RESPONSE CLARIFICATION](#).

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

6.2.2. 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. If appropriate, errors may be corrected in accordance with the following:

1. If the Bidder's intent is clearly established based on review of the complete proposal submittal, the State may at its sole option correct an error based on that established intent.
2. If the State discovers obvious clerical or arithmetic errors, the State may, at its sole option, correct such errors. If the mathematical correction results in significant changes to the Bidder's response, the State will provide the Bidder the opportunity to validate the resulting correction.
3. It is essential that Bidders carefully review the cost elements in their proposals since they may not be provided the opportunity to correct errors after submission.
4. In the event an ambiguity or discrepancy between any of the State's solicitation documents, is detected after review of the bids, the State reserves the right to seek clarification and acceptance from the Bidder.
5. The Bidder is required to thoroughly review the solicitation to ensure that its proposal is fully responsive with the solicitation requirements and thereby avoid the possibility of being ruled non-responsive. It is the Bidder's responsibility to utilize the question and answer process to clarify any ambiguities in the solicitation requirements to ensure that the Bidder is submitting a responsive proposal.
6. At the State's sole discretion, it may declare all proposals to be Draft Proposals. Bidders may not protest the State's determination of all proposals being declared Draft Proposals. If all proposals are declared to be Draft Proposals, the State may issue an addendum to this solicitation. Should this occur, confidential discussions may be held with Bidders that wish to remain under consideration. Each Bidder will be notified of the due date for the submission of a new proposal to the State. This submission must conform to the requirements of the original RFP or as modified by an addendum. The new proposals will be evaluated as required by [SECTION 6. EVALUATION](#).

6.2.2.1. BIDDER RESPONSE CLARIFICATION

The State may request that a Bidder clarify any area of their response that the State determines to be unclear. The State may also request clarification for areas that may render the proposal non-responsive to the requirements and provide Bidders the opportunity to resubmit 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. NON COST EVALUATION

All proposals received by the date and time specified in [SECTION 2.3. KEY ACTION DATES](#), will be evaluated. Review of proposals will begin by validating if each of the Bidders have provided a response to all requirements specified in [SECTION 3. PROPOSAL REQUIREMENTS](#), which require proposal submittal documents. If the proposal fails to meet any requirement, the Bidder may be disqualified.

6.3.1. ADMINISTRATIVE EVALUATION

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

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

6.3.2. QUALIFICATION EVALUATION

All [SECTION 3.3. QUALIFICATION REQUIREMENTS](#) labeled with (M) are mandatory, whereas Qualification Requirements labeled with (DS) are optional. Bidders are not required to respond to optional requirements. Review of the proposals will begin with ensuring that the Bidder has responded to all mandatory Qualification Requirements.

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

6.3.2.1. BIDDER QUALIFICATIONS EVALUATION

The State will evaluate Bidder qualifications using the information contained in the completed [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#). Descriptions of experience must be clear, concise, and apply directly to the requirements.

The evaluation team will evaluate the completed [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#) for compliance with the mandatory requirements specified in [SECTION 3.3.1. BIDDER QUALIFICATIONS \(M\)](#). The Bidder Qualification Requirements are evaluated as either Pass or Fail. If the completed Bidder Qualification Forms fail to document the Bidder's experience sufficiently for the evaluation team to determine if the Bidder meets a requirement, the evaluation team may utilize the Request for Clarification process per [Section 6.2.2.1. BIDDER RESPONSE CLARIFICATION](#). Failure to provide the mandatory experience required by the State or failure to meet any mandatory requirements specified in [SECTION 3.3.1. BIDDER QUALIFICATIONS \(M\)](#) will be considered a deviation in accordance with [SECTION 2.4.1. IDENTIFICATION AND CLASSIFICATION OF SOLICITATION REQUIREMENTS](#).

To aid the State in evaluating Bidder qualifications, the Bidder should use a MM/DD/YYYY format when indicating project start and end dates. If a Bidder submits a proposal using any other date format, the State will count only the whole months or years between the start and end dates specified. For example, Bidder "A" cites start and end dates for a project as 01/02/2024 and 6/02/2024, the Bidder or staff member would only be credited with six (6) months of experience.

If a project end date is ongoing or exceeds the proposal due date, then the Bidder will receive credit for only the experience acquired up to the proposal due date specified in [SECTION 2.3. KEY ACTION DATES](#). In this instance, Bidders are instructed to use the proposal due date as the end date of ongoing projects.

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

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

6.3.2.2. BIDDER REFERENCES EVALUATION

The State will evaluate the Bidder's references using the information provided in each [ATTACHMENT 14: BIDDER REFERENCE FORM](#). The evaluation team will evaluate the completed [ATTACHMENT 14: BIDDER REFERENCE FORM](#) for compliance with the mandatory requirements specified in [SECTION 3.3.2. BIDDER REFERENCES \(M\)\(MS\)](#). The Bidder Reference Requirements are evaluated as either Pass or Fail. Each Bidder Reference Sheet must receive a "YES" on each question to Pass. The Bidder must submit one (1) [ATTACHMENT 14: BIDDER REFERENCE FORM](#) for each project cited on [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#). The evaluation team will confirm all information

requested by the State is completed on [ATTACHMENT 14: BIDDER REFERENCE FORM](#).

If the evaluation team determines the completed [ATTACHMENT 14: BIDDER REFERENCE FORM](#) does not document the Bidder's experience sufficiently, they may utilize the Request for Clarification process per [SECTION 6.2.2.1. BIDDER RESPONSE CLARIFICATION](#). Failure to provide verifiable references or failure to meet any mandatory requirement specified in [SECTION 3.3.2. BIDDER REFERENCES \(M\)\(MS\)](#) will be considered a deviation in accordance with [SECTION 2.4.1. IDENTIFICATION AND CLASSIFICATION OF SOLICITATION REQUIREMENTS](#)

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

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

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

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

6.3.2.3. KEY STAFF QUALIFICATIONS EVALUATION

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

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

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

Concurrent project timeframes (overlapping dates) will only count once for calculating the number of years

and months of qualification experience for Key Staff.

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

For each Key Staff, the Evaluation Team will first evaluate the completed [ATTACHMENT 15.1: PROJECT MANAGER KEY STAFF QUALIFICATIONS FORM](#) and [ATTACHMENT 15.2: TECHNICAL LEAD KEY STAFF QUALIFICATIONS FORM](#) for compliance with the instructions specified in the form and in [SECTION 3.3.3. KEY STAFF QUALIFICATIONS \(M\)\(MS\)](#).

Next, the State will evaluate Key Staff experience and award points as applicable using the Bidder's response to the mandatory (M) and desirable scorable (DS) requirements. Bidder must provide complete responses to each (M) and (DS) requirements.

The State will evaluate each qualification to determine whether the response fully addresses the requirements in accordance with the following criteria:

1. Mandatory (M) requirements: The Mandatory Qualifications are evaluated as Pass or Fail. The evaluation team will evaluate Bidder's responses to every qualification listed in [ATTACHMENT 15.1: PROJECT MANAGER KEY STAFF QUALIFICATIONS FORM](#) AND [ATTACHMENT 15.2: TECHNICAL LEAD KEY STAFF QUALIFICATIONS FORM](#) to confirm compliance. If the Bidder responds with a "No" response to any qualifications, the proposal will be deemed non-responsive, and the Bidder disqualified.
2. Desirable Scorable (DS) requirements: Desirable Scorable Qualifications are non-mandatory. The evaluation team will evaluate Bidder's description for every desirable scorable (DS) qualification listed in [ATTACHMENT 15.1: PROJECT MANAGER KEY STAFF QUALIFICATIONS FORM](#) and [ATTACHMENT 15.2: TECHNICAL LEAD KEY STAFF QUALIFICATIONS FORM](#) to determine whether the response fully addresses the (DS) qualifications and will determine points awarded utilizing the scoring key as shown in Table 6.3.2.3-1.

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.

Table 6.3.2.3-1

Evaluation Criteria — Project Manager	Point Value	Point Total
For each year of experience, up to 5 year(s)	2	10

Evaluation Criteria — Technical Lead	Point Value	Point Total
For each year of experience, up to 5 year(s)	4	20

6.3.2.4. KEY STAFF REFERENCES EVALUATION

The Bidder must complete and submit one (1) Key Staff Reference form using the applicable Attachment for each Key Staff project cited in the Key Staff Qualification Forms. The Bidder must submit a minimum of two (2) completed Key Staff Reference Forms from each proposed Key Staff.

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

References will be scored as Pass or Fail based upon the answers provided by the reference(s). Each Key Staff Reference Sheet must receive a "YES" on each question to Pass. Any conflicting information may result in the offer being deemed non-responsive.

References that are returned with an unsatisfactory rating for any question may, at the State's discretion, may be considered non-responsive and may be the basis for rejecting the Bidder's proposal

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

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

hours of the second contact attempt.

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

6.3.3. SOLUTION REQUIREMENTS EVALUATION

All [SECTION 3.4. SOLUTION REQUIREMENTS](#) labeled with (M) and (MS) are mandatory. Review of the proposals will begin with ensuring that the Bidder has responded to all mandatory Solution Requirements.

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

6.3.3.1. FUNCTIONAL AND NON-FUNCTIONAL EVALUATION

The functional and non-functional requirements identified in [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#) consist of (M) and (MS) requirements. The Bidder must provide complete responses to each (M) and (MS) requirement.

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

1. Mandatory (M) requirements:

The Mandatory FUNCTIONAL AND NONFUNCTIONAL Requirements are evaluated as either pass or fail. Bidders must respond "Yes" to "Bidder Agrees to Meet Requirement (Yes/No)" to pass each requirement identified in [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#). The evaluation team will evaluate Bidder's responses to every requirement listed in [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#) to confirm compliance. If the Bidder responds with a "No" response to any requirement, the proposal will be deemed non-responsive, and the Bidder disqualified.

2. Mandatory Scorable (MS) requirements:

Bidders must respond "Yes" to "Bidder Agrees to Meet Requirement (Yes/No)" to each requirement identified in [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#) and provide a description of how they will meet the mandatory scorable (MS) requirement in the "Describe the Proposed Solution to Meet or Exceed Requirement". The evaluation team will evaluate Bidder's description to every mandatory scorable (MS) requirement listed in [EXHIBIT C: FUNCTIONAL](#)

AND NON-FUNCTIONAL REQUIREMENTS to determine whether the response fully addresses the (MS) requirements and will determine points awarded utilizing the scoring as shown in Table 6.3.3.1-1.

Bidders can receive up to 927 points for the Mandatory Scorable (MS) **EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS**, and each MS requirement is worth a maximum of nine (9) points. Point values will be given as indicated in Table 6.3.3.1-1: Scoring for FUNCTIONAL AND NONFUNCTIONAL Requirements.

Table 6.3.3.1-1: Scoring for FUNCTIONAL AND NONFUNCTIONAL Requirements

Evaluation Criteria	Point Value
Demonstrates in the Bidder's own words a thorough, detailed, and comprehensive understanding of the requirement. Demonstrates the ability and intent to meet or exceed the requirement in full. Provides evidence of proven ability to meet or exceed the requirement or detailed plans or methodology that further demonstrates how the requirement will be optimally met or exceeded. Provides an approach that is fully achievable, applies best practices, is clearly and concisely presented, and is logically organized and well-integrated.	9
Demonstrates in the Bidder's own words a comprehensive understanding of the requirement. Demonstrates the ability and intent to meet the requirement in full. Provides some evidence of proven ability to meet the requirement or detailed plans or methodology that further demonstrates how the requirement will be met. Provides an approach that is mostly achievable, suitable, acceptably presented, sufficiently organized and integrated.	6

Simply repeats or paraphrases the requirement.	3
Meets or partially meets the RFP requirement without supporting description or literature.	
Does not demonstrate that the Bidder fully understands the requirement.	
Provides an approach that is not fully achievable, somewhat suitable, less than acceptably presented, somewhat unorganized, and partially integrated.	
Response is not relevant; or	0
Response does not demonstrate an understanding of; or inaccurately interpreted the requirement; or	
The approach is not achievable; or	
The Bidder failed to provide narrative to support the requirement; or	
The Bidder provided a narrative that counters or softens the "Yes" response to a mandatory requirement with a statement that "intends" to support the mandatory requirement.	

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

6.3.3.2. DELIVERABLES AND MILESTONES EVALUATION

The State will evaluate the [EXHIBIT D: DELIVERABLES AND MILESTONES 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 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 AND MILESTONES TABLE](#).

6.3.3.3. NARRATIVE EVALUATION

The narrative response requirements identified in [ATTACHMENT 17: NARRATIVE RESPONSE](#) consist of

(MS) requirements.

The State will evaluate each narrative response, to determine whether the response fully addresses the requirements in accordance with the following criteria:

1. Mandatory Scorable (MS) requirements:

The Bidder must provide a complete response to each (MS) requirement. The evaluation team will evaluate the Bidder's response to determine whether the response fully addresses the (MS) requirements and will determine points awarded utilizing the scoring criteria as shown in Table 6.3.3.1-2.

Bidders can receive up to 2,781.00 points for the Mandatory Scorable (MS) Narrative Response Requirements, broken out as follows:

Table 6.3.3.3-1 Narrative Response Points

Narrative Response Number	Maximum Points
1	417.15
2	278.10
3	278.10
4	250.29
5	250.29
6	222.48
7	194.67
8	166.86
9	166.86
10	139.05
11	139.05
12	111.24

13	83.43
14	55.62
15	27.81
TOTAL POINTS	2,781.00

Points will be awarded based as outlined in Table 6.3.3.3-2

below:

Table 6.3.3.3-2 Narrative Scoring Criteria

Evaluation Criteria	Point Value
Demonstrates in the Bidder's own words a thorough, detailed, and comprehensive understanding of the requirement. Demonstrates the ability and intent to meet or exceed the requirement in full. Provides evidence of proven ability to meet or exceed the requirement or detailed plans or methodology that further demonstrates how the requirement will be optimally met or exceeded. Provides an approach that is fully achievable, applies best practices, is clearly and concisely presented, and is logically organized and well-integrated.	100% of the total points
Demonstrates in the Bidder's own words a comprehensive understanding of the requirement. Demonstrates the ability and intent to meet the requirement in full. Provides some evidence of proven ability to meet the requirement or detailed plans or methodology that further demonstrates how the requirement will be met. Provides an approach that is mostly achievable, suitable, acceptably presented, sufficiently organized and integrated.	66% of the total points

Simply repeats or paraphrases the requirement.	33% of the total points
Meets or partially meets the RFP requirement without supporting description or literature.	
Does not demonstrate that the Bidder fully understands the requirement.	
Provides an approach that is not fully achievable, somewhat suitable, less than acceptably presented, somewhat unorganized, and partially integrated.	
Response is not relevant; or	0 points*
Response does not demonstrate an understanding of; or inaccurately interpreted the requirement; or	
The approach is not achievable; or	
The Bidder failed to provide narrative to support the requirement; or	
The Bidder provided a narrative that counters or softens the "Yes" response to a mandatory requirement with a statement that "intends" to support the mandatory requirement.	

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

6.3.4. CALCULATE BIDDER PROPOSAL NON-COST SCORE

The Bidder’s non-cost score is the sum of the following:

- 1. [ATTACHMENT 15.1: PROJECT MANAGER KEY STAFF QUALIFICATIONS FORM](#)
- 2. [ATTACHMENT 15.2: TECHNICAL LEAD KEY STAFF QUALIFICATIONS FORM](#)
- 3. [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#)
- 4. [ATTACHMENT 17: NARRATIVE RESPONSE](#)

The table below is an illustration of this process.

Table 6.3.4-1: Bidder Proposal Non-Cost Score Calculation

Bidder Proposal Non-Cost Score Calculation

Hypothetical Bidder	Hypothetical Bidder Qualification Requirement Score (30 Points maximum)	Hypothetical Bidder Solution Requirements Score (3708 Points maximum)	Hypothetical Bidder Proposal Non Cost Score Summation (3,738 Points maximum)
A	10.00	2,500.00	2,510.00
B	15.00	3,500.00	3,515.00
C	30.00	2,798.00	2,828.00

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

6.4. COST EVALUATION

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

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

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

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

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

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

NOTE: It is imperative that no cost information be included anywhere outside of [EXHIBIT E: COST](#)

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

6.4.1. COST SCORE CALCULATION

All cost worksheets will be validated to verify completeness and mathematical accuracy. If appropriate, errors will be corrected in accordance with **SECTION 6.2.2. ERRORS IN THE PROPOSAL**. After costs have been verified for accuracy, the Bidder with the lowest proposed Total Cost will receive the maximum score of two thousand four hundred ninety two (2,492.00) points. All other Bidders will receive a proportionally lower score using the ratio of the lowest proposed Total Cost to the Bidder's proposed Total Cost applied to the maximum of 2,492.00 points, as shown in Table 6.4.1-1 below:

Table 6.4.1-1: Bidder Total Cost Score Formula

(Lowest proposed Total Cost)	X 2,492.00 points = Bidder Total Cost score
(Bidder's proposed Total Cost)	

The total evaluated cost score calculation in Table 6.4.1-2, Example of Bidder Total Cost Score Calculation illustrates that Bidder C proposed the lowest Total Cost and received the maximum points possible.

Table 6.4.1-2: Bidder Total Cost Score Calculation Example

Hypothetical I BIDDER	Hypothetical BIDDER'S TOTAL COST	CALCULATION USING FORMULA				Hypothetical BIDDER'S TOTAL COST SCORE
A	\$ 500,000	(\$300,000/\$500,000)	X	2,492 Points	=	1,495.20
B	\$ 400,000	(\$300,000/\$400,000)	X	2,492 Points	=	1,869.00
C	\$ 300,000	(\$300,000/\$300,000)	X	2,492Poin ts	=	2,492.00

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

6.5. SOCIOECONOMIC PROGRAMS EVALUATION

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 6.6-1, Bidder Final Score Calculation provided that the Bidder's proposal is not otherwise determined to be non-responsive to any mandatory requirements.

6.5.1. DVBE INCENTIVE EVALUATION

In accordance with §999.5(a) of the Military and Veterans Code, for evaluation purposes only, the State shall provide an incentive to Bidders who provide California-certified DVBE participation that exceeds the California-certified DVBE participation goal in the amounts shown in Table 6.5.1-1 DVBE Participation Incentive Formula.

The State will verify DVBE and apply the incentive accordingly. The DVBE Incentive points are a percentage of the total possible points. The maximum incentive for this procurement is five percent (5%) of the total points available, and is based on the amount of DVBE participation confirmed. Table 6.5.1-1 below is an illustration of this calculation:

Table 6.5.1-1: DVBE Incentive Formula

CONFIRMED DVBE PARTICIPATIO N	DVBE INCENTIVE PERCENTAGE	DVBE INCENTIVE POINTS CALCULATION (TOTAL POINTS X DVBE INCENTIVE PERCENTAGE)				
≥ 5%	5%	6,230.00	x	0.05	=	311.50
4% - 4.99%	4%	6,230.00	x	0.04	=	249.20
3.% - 3.99%	3%	6,230.00	x	0.03	=	186.90
<3%	0%	6,230.00	x	0	=	0.00

6.5.2. SMALL BUSINESS PREFERENCE EVALUATION

The State will verify Small Business/Non-Small Business preference claim and apply the five percent (5%) preference accordingly. Refer to [SECTION 3.2.14.3. SMALL BUSINESS PREFERENCE \(O\)](#) and [SECTION 3.2.14.4. NON-SMALL BUSINESS SUBCONTRACTOR PREFERENCE \(O\)](#) for more information.

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

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

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

For an illustration of this process, refer to the example in Table 6.5.2-1, Small Business Preference Points Calculation. Points in this example explain the calculations and have no other significance.

The preference points for Bidders A and B are based on five percent (5%) of the Bidder proposal score of Bidder C, the highest scorer of a non-small business, which is $(5,320.00 \text{ points}) \times (.05) = 266.00.00 \text{ points}$ (rounded). Bidder C, which is neither a small business nor a non-small business subcontracting a minimum of 25 percent (25%) to a small business, receives no small business preference points.

Table 6.5.2-1: Small Business Preference Points Calculation

Hypothetical BIDDER	Hypothetical BIDDER TOTAL PROPOSAL SCORE POINTS	SMALL BUSINESS PREFERENCE CLAIM?	NON-SMALL BUSINESS PREFERENCE CLAIM?	Hypothetical SMALL BUSINESS PREFERENCE POINTS AWARDED
A	4,005.20	Yes	No	266.00
B	5,384.00	No	Yes	266.00
C	5,320.00	No	No	0.00

NOTE: Calculation is based on 5% of the Bidder with the highest “Bidder proposal score” that is a non-small business. In the example Table 6.5.2-1, Bidder C has the highest non-small business score.

6.6. BIDDER FINAL SCORE CALCULATION

The evaluation team will calculate the Bidder’s final score. Table 6.6-1, Bidder Final Score Calculation, illustrates the Bidder’s final score that incorporates both preference and incentive points:

Table 6.6-1: Bidder Final Score Calculation

Hypothetical I BIDDER	Hypothetical BIDDER TOTAL PROPOSAL POINT SCORE	Hypothetical SMALL BUSINESS PREFERENCE POINTS AWARDED	VERIFIED DVBE %	Hypothetical I DVBE INCENTIVE POINTS AWARDED	Hypothetical BIDDER FINAL POINT SCORE
A	4,005.20	266.00	3%	186.90	4,458.10
B	5,384.00	266.00	4%	249.20	5,899.20
C	5,320.00	0.00	5%	311.50	5,631.50

NOTE: Bidder’s final score calculation in Table 6.6-1 is an example that explains the calculations and has no other significance.

6.7. PROPOSAL RANK DETERMINATION

The State will determine which Bidder has the highest combined score for the bid requirements and cost, up to the maximum points, plus any preference and/or incentive points. The State will rank all qualified

proposals by the Bidder's final score. Table 6.7-1 demonstrates how the final ranking determination is made:

Table 6.7-1: Example of Final Score and Rank Determination

REQUIREMENT	MAX SCORE	BIDDER A	BIDDER B	BIDDER C
Administrative Requirements	Pass/Fail	Pass	Pass	Pass
Bidder Qualifications - Mandatory	Pass/Fail	Pass	Pass	Pass
Bidder Reference	Pass/Fail	Pass	Pass	Pass
Bidder Narrative	2,781.00	1,573.00	2,573.00	1,871.00
Requirements for two (2) Proposed Key Staff - Mandatory	Pass/Fail	Pass	Pass	Pass
Requirements for Proposed Key Staff - Desirable	30.00	10.00	15.00	30.00
Key Staff Reference Forms	Pass/Fail	Pass	Pass	Pass
Deliverables Requirements	Pass/Fail	Pass	Pass	Pass
Functional & Non-Functional Requirements	927.00	927.00	927.00	927.00
Total Non-Cost Score	3,780.00	2,510.00	3,515.00	2,828.00
Total Cost Score	2,492.00	1495.20	1869.00	2,492.00
TOTAL PROPOSAL SCORE	6,320.00	4,005.20	5,384.00	5,320.00
Initial Rank (Before preferences and incentives)		3	1	2
DVBE Participation claimed	Yes/No; %	Yes; 3%	Yes; 4%	Yes; 5%
DVBE Incentive Points	311.50	186.90	249.20	311.50
Small Business claimed	Yes/No	Yes	No	No

Small Business Preference Points	266.00	266.00	0.00	0.00
Non-Small Business Claimed	Yes/No	No	Yes	No
Non-Small Business Preference Points	266.00	0.00	266.00	0.00
BIDDER FINAL SCORE	7,079.50	4,458.10	5,899.20	5,631.50
FINAL RANK		3	1	2

6.8. SUBMISSION OF AMENDED FINAL PROPOSAL(S)

The State may require submission of an amended final 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 Public Contract Code (PCC) §6611, which provides the authority to use a competitive negotiation process when the State's business needs or the purpose of a procurement or contract is known, but negotiation is necessary to ensure the State receives the best value or the most cost-efficient goods, services, information technology, and telecommunications technology.

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

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

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

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

issuance of the notification of award.

7.1. PROCEEDING TO NEGOTIATIONS

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

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

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

7.2. NEGOTIATION INVITATION

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

1. 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) working days of invitation.

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

7.3. BEST AND FINAL OFFER SUBMISSION (BAFO)

At the conclusion of negotiations, the State may request a best and final offer (BAFO) submission. The intent of the BAFO is to clarify and document understandings reached during negotiations. The State will include a date and time for submission of the BAFO. A Bidder's BAFO is an irrevocable offer for one hundred and twenty (120) calendar days following the Contract Award date specified in [SECTION 2.3. KEY ACTION DATES](#). A Bidder may extend the offer in the event of a delay in the Contract Award.

7.4. EVALUATION OF BAFO SUBMISSION

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

8. CONTRACT AWARD

Contract Award, if made, will be to the Bidder that meets and/or exceeds the State's requirements and

provides the best value to the State and will occur pursuant to the Key Action Dates of the solicitation document specified in [SECTION 2.3. KEY ACTION DATES](#). However, the State, at its sole option, may change the Contract Award date.

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

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

9. DEBRIEFING

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

10. PROTESTS OF AWARD

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



Request For Proposal RFP 2026-11001

PART 2 – BIDDER RESPONSE

FOR

STATE TAX ADMINISTRATION ROLL SYSTEM (STARS) SOLUTION

June 5, 2026

Issued by:

STATE OF CALIFORNIA

State Board of Equalization

Disclaimer: The original PDF version and any subsequent solicitation addendums 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.

EXHIBIT A: STATEMENT OF WORK

EXHIBIT A: STATEMENT OF WORK identifies and describes the tasks and responsibilities of the Contractor and the responsibilities of the State during the term of the Contract.

The Bidder is advised that deviations from the SOW may be the basis for rejection of the Bidder's proposal.

Refer to the Word Document file on Cal eProcure labeled Exhibit A STARS SOW.

EXHIBIT B: BUDGET DETAIL AND PAYMENT PROVISIONS

1. PAYMENT TERMS AND INVOICING REQUIREMENTS

Upon completion and State Acceptance of each Deliverable satisfactorily rendered, and upon receipt and approval of the invoice(s), the State agrees to pay the Contractor for said accepted Deliverable in accordance with the rates specified in [EXHIBIT E: COST WORKBOOK](#)

Payment Terms and Invoicing Requirements

Item 1. The maximum amount of the Base Contract payable under this Agreement will be \$XXXXX. The maximum amount of each Contract extension, if any, is \$ XXXXX per year and shall not exceed \$ XXXXX for the total Contract amount.

For services satisfactorily rendered, and upon receipt and approval of the invoice(s), the State agrees to pay the Contractor for said services in accordance with the Deliverable and rates specified in [EXHIBIT E: COST WORKBOOK](#)

Deliverables can cross Fiscal Years. The Contractor must follow the Payment Provision guidelines regarding invoicing instructions and requirements as spelled out specifically in this Exhibit.

Invoices shall be accurate, complete, and shall be on the Contractor's letterhead and include the following: Remit To address, the Contractor's name, the BOE Agreement number, 20XX-XXXXX, Fi\$Cal PO #0860-XXXXXX and the invoice total. Invoices shall be submitted not more frequently than monthly in arrears.

Each invoice shall identify the Deliverable, by either task number and/or title, including month or week, and the cost as itemized in [EXHIBIT E: COST WORKBOOK](#) Invoices not adhering to these guidelines may be rejected or delayed in payment until corrected by the Contractor.

The Contractor shall invoice the BOE per Deliverable and shall submit invoices via an electronic copy to: CDTFAInvoices@ cdtfa.ca.gov.

Failure to provide the Agreement number and FI\$Cal PO number on the invoice will likely result in delayed payment.

Any invoices submitted without the above referenced information may be returned to the Contractor for further re-processing.

2. BUDGET CONTINGENCY CLAUSE

It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this contract does not appropriate sufficient funds for the program, this contract shall be of no further force and effect. In this event, the state shall have no liability to pay any funds whatsoever to the Contractor or to furnish any other considerations under this contract and the Contractor shall not be obligated to perform any provisions of this contract.

If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this program, the state shall have the option to either cancel this contract with no liability occurring to the State, or offer a contract amendment to the Contractor to reflect the reduced amount.

3. PROMPT PAYMENT CLAUSE

Payment for services under this Contract shall be made in accordance with the State of California's Prompt Payment Act (Government Code Section 927 et seq.) The Prompt Payment Act requires State agencies to pay properly submitted, undisputed invoices within forty-five (45) calendar days of initial receipt.

4. SALES TAX

Sales Tax is not to be included in the cost workbook. 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 the California Department of Tax and Fee Administration Sales and Use Tax Regulation 1502 (f) (1) (D).

5. PROGRESS PAYMENT

In accordance with Public Contract Code, §12112, the State will withhold, from the invoiced payment amount to the Contractor, an amount equal to twenty percent (20%) of the payment. Such retained amount shall be held by the State and only released to the Contractor upon the State's Project Manager determining that the Contractor has satisfactorily completed all the required services related to the Final System Acceptance in accordance with Exhibit A: Statement of Work.

6. PAYMENT METHOD

Each COST Deliverable shall be billable upon the completion of all sub-deliverables which have received a State Acceptance of the Deliverable. In no event shall payment be made for a COST Deliverable until all

prior sub-deliverables have received Acceptance from the State. The State shall make payments to the Contractor only once a month and only for those Deliverables for which Acceptance by the State was provided during the previous month.

7. COST LIMITATION

The total amount of this Agreement shall not exceed the amount specified in the Standard Agreement, and any amendments thereafter.

8. CONTRACTOR NAME CHANGE

An amendment is required to change the Contractor's name as listed in this Agreement. Upon receipt of legal documentation of the name change, the State will process the amendment. Payment of invoices presented with a new name cannot be paid prior to approval of said amendment.

9. TRAVEL AND PER DIEM EXPENSES

There will be no travel or per diem costs reimbursed under this contract.

10. FINAL BILLING

Invoices for services must be received by the state within 90 days following each state fiscal year, or 90 days following the end of the contract term, whichever comes first. The final invoice must include the statement "Final Billing."

EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS

The Bidder must indicate agreement to each of the functional and non-functional requirements in [EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#). Refer to the Excel Workbook file on Cal eProcure labeled Exhibit C STARS FNF REQ for submission of your Solution Requirement confirmation.

EXHIBIT D: DELIVERABLES AND MILESTONES TABLE

Bidder must indicate agreement to each of the Deliverable Items listed in the table below as described in +EXHIBIT A: SOW Section 18

Bidder must indicate agreement to each of the Deliverable Items listed in the table below as described in +SECTION 1. PROJECT (CONTRACTOR) TASKS AND DELIVERABLE REQUIREMENTS.+EXHIBIT A: SOW Section 18

Deliverable ID	Deliverable Item	Scheduled Completion	Contractor Agrees to Provide Deliverable (Yes/No)
DEL-1.0	Project Management and Preparations		
DEL-1.1	KICK OFF MEETING	Four (4) State business days from when Contractor Key Staff Has Completed Background Checks and CDTF A Security Training	Yes ☐ No ☐
DEL-1.2	PROJECT MANAGEMENT PLAN (PMP) INCLUDING PRODUCT SOLUTION IMPLEMENTATION ROADMAP	Eight (8) State business days from the project kick-off meeting (DEL-1.1)	Yes ☐ No ☐
DEL-1.3	PROJECT SCHEDULE, INCLUDING PRODUCT SOLUTION IMPLEMENTATION ROADMAP AND	Forty Five (45) days after the Kick-off Meeting	Yes ☐ No ☐

	SCHEDULE		
DEL-1.4	INTERFACES MANAGEMENT PLAN		Yes ☐ No ☐
DEL-1.5	DATA MANAGEMENT PLAN WITH DATA CONVERSION AND MIGRATION		Yes ☐ No ☐
DEL-1.6	SYSTEM CONFIGURATION MANAGEMENT PLAN		Yes ☐ No ☐
DEL-1.7	STARS SOLUTION IMPLEMENTATION PLAN		Yes ☐ No ☐
DEL-1.8	QUALITY MANAGEMENT PLAN		Yes ☐ No ☐
DEL-1.9	TEST PLAN		Yes ☐ No ☐
DEL - 1.10	STARS SOLUTION TRAINING PLAN		Yes ☐ No ☐
DEL - 1.11	SECURITY PLAN		Yes ☐ No ☐
DEL - 1.12	TRANSITION OUT PLAN		Yes ☐ No ☐
DEL - 1.13	MAINTENANCE AND OPERATIONS PLAN		Yes ☐ No ☐

DEL- 2.0	DESIGN, DEVELOPMENT, IMPLEMENTATION AND TESTING OF A State ASSESSED PROPERTIES DIVISION (SAPD) WITH PRIVATE RAIL CAR (PRC) TAX AND VALUATION COMPUTATION AND ANALYTICS PLATFORM WITH A FULLY INTEGRATED E-FILE WEB PORTAL, CASE MANAGEMENT SYSTEM, AND ASSOCIATED MODULES	To be determined by the Contractor's Project Schedule	Yes ☐	No ☐
DEL- 2.1	SYSTEM TECHNICAL ARCHITECTURE (STA)	To be determined by the Contractor's Project Schedule	Yes ☐	No ☐
DEL - 2.1.1	COMPLETE THE CALIFORNIA CLOUD SERVICES ASSESSMENT (CCSA)	To be determined by the Contractor's Project Schedule	Yes ☐	No ☐
DEL- 2.1.2	PROVIDE THE MEANS AND GENERATE DATA MODEL AND DATA DICTIONARY (DMDD) DOCUMENTS	To be determined by the Contractor's Project Schedule	Yes ☐	No ☐
DEL- 2.1.3	PROVIDE THE DETAILED SYSTEM DESIGN (DSD) DOCUMENT	To be determined by the Contractor's Project Schedule	Yes ☐	No ☐
DEL- 2.2	PROVIDE A FULL SERVICE AND FULL-FEATURED E-FILE ASSESSEE TAX FILING WEB PORTAL AND MAKE ASSESSEE AND CUSTOMER READY FOR USE	To be determined by the Contractor's Project Schedule	Yes ☐	No ☐
DEL- 2.3	IMPLEMENTING TAX AND VALUATION COMPUTATION ALGORITHMS PER STATE ASSESSED PROPERTIES DIVISION (SAPD) AND PRC BUSINESS RULES	To be determined by the Contractor's Project Schedule	Yes ☐	No ☐

DEL- 2.4	IMPLEMENTING BOE DATA GOVERNANCE REQUIREMENTS AND POLICY	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.5	PROVIDE A CONTENT MANAGEMENT AND ACCESS INTERFACE TO ALL OF THE STATE'S CONTENT STORED IN THE CDTFA STORAGE INFRASTRUCTURE TO CREATE A SEARCHABLE, CENTRALIZED STORAGE SYSTEM	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.6	PROVIDING THE CAPABILITY FOR FULL DATA VISUALIZATION FOR AD HOC REPORT AND LETTER GENERATION, WHILE PROVIDING DASHBOARDS OF WORKFLOW PROGRESS AND KEY BUSINESS/ PERFORMANCE INDICATORS (KPI)	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.7	IMPLEMENTING A FULLY INTEGRATED CASE MANAGEMENT CAPABILITY TO ALL OF THE STATE'S ASSESSEES AND CUSTOMERS TO ADMINISTER, INVESTIGATE, AND TRACK ACCOUNT BUSINESS ACTIVITIES	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.8	IMPLEMENTING THE STATE EFFORTS TO "GO PAPERLESS" TO INCLUDE A UNITED STATES POSTAL SERVICE (USPS) MASS MAILINGS AND MASS E-MAIL SYSTEM, PER BUSINESS AND STATUTORY REQUIREMENTS	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.9	IMPLEMENTING THE AUDIT AND APPRAISAL BUSINESS WORKFLOW EFFICIENCIES REQUIREMENTS	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.10	IMPLEMENT THE CAPABILITY FOR BROADBAND CONNECTIVITY TO THE SOLUTION FOR REMOTE UPLOAD OR	To be determined by the Contractor's	Yes ☐

	DOWNLOAD OF CONTENT FOR REAL PROPERTY WORK	Project Schedule	No ☐
DEL- 2.11	PROVIDES METADATA FOR ALL DATA NEEDED AND GENERATED BY THE STARS SOLUTION	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.12	DEVELOP STARS SOLUTION TRAINING MATERIALS AND COMPLETE TRAINING	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.13	PERFORM SYSTEM FUNCTIONALITY TESTING	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.14	PERFORM SOLUTION TESTING	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 2.15	ENABLE, ADMINISTER, AND FACILITATE USER ACCEPTANCE TESTING (UAT)	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 3.0	OPERATIONS AND CLOSE OUT	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 3.1	OPERATIONS SUPPORT AND PERFORMANCE TASKS AND ACTIVITIES	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL- 3.2	STARS FINAL SYSTEM AND INTERFACES INTEGRATION TESTING	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
DEL - 3.3	STARS FINAL END TO END ACCEPTANCE TESTING	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐

DEL - 3.4	TRANSITION OUT SERVICES	To be determined by the Contractor's Project Schedule	Yes ☐ No ☐
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EXHIBIT E: COST WORKBOOK

The cost workbook shall be completed in accordance with the instructions in [SECTION 4. COST](#) and [SECTION 5. PROPOSAL/BID FORMAT AND SUBMISSION REQUIREMENTS](#) .

Refer to the Excel Workbook file on Cal eProcure labeled Exhibit E STARS Cost Workbook for submission of your Cost Data.

ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL/ REQUEST FOR CHANGES

The Bidder is required to use the format listed below when submitting questions and request for changes to the Procurement Officer listed in [SECTION 2.2.1. PROCUREMENT OFFICER](#). Written questions and request for changes must be submitted in Microsoft Excel or Word version. Instructions are as follows:

Name of Bidder – Provide the name of the bidding firm

Contact Person – Provide the name of the person to contact if the State needs clarification about the question.

Contact Email and Phone Number – Provide the email and phone number (including area code) for the listed contact person.

Q # – Sequentially number each question/request for change, always starting at one (1) for each submission.

Section/Document(s) – Identify the section or document the request pertains to, such as “Request for Proposal, [SECTION 3.3.3. KEY STAFF QUALIFICATIONS \(M\)\(MS\)](#).”

Page # – Identify the page number of the section/document name or title the question pertains to.

Question/Request for Change – Write the question and/or request for change in this column. If the Bidder is requesting a change, the Bidder must apply track changes to ensure the requested change is evident.

Bidder’s Rationale for Change Requests: Provide an explanation for the requested change.

Expand or reduce the number of rows to accommodate the number of questions.

Question/Request for Changes Form
Name of Bidder:
Contact Person:
Contact Email and Phone Number:

Question/Request for Changes Form				
Q #	Section/Document(s)	Page #	Question/Request for Change	Bidder's Rationale for Change Request
1				
2				
3				
4				

ATTACHMENT 2: INTENT TO BID FORM

The Bidder should complete and submit this form per the instructions in +SECTION 2.2.3. INTENT TO BID.

Bidder's Legal Company/Firm Name: _____

INTENT TO BID SELECTION (select one):	
☐	Intends to submit a bid and has no issues with the solicitation requirements.
☐	Intends to submit a bid but has one (1) or more issue(s) with the requirements. (Use ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL/REQUEST FOR CHANGES and submit by the dates specified in SECTION 2.3. KEY ACTION DATES.)
☐	Does not intend to submit a bid and has one (1) or more issues(s) with the solicitation requirements. (Use ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL/REQUEST FOR CHANGES and submit by the dates specified in SECTION 2.3. KEY ACTION DATES.)

The Bidder's Representative(s) to Access the Bidders' Library (Refer to [SECTION 2.2.5. BIDDERS' LIBRARY](#)):

(Note: Bidder must have returned [ATTACHMENT 6: CONFIDENTIALITY STATEMENT FORM](#) before access to Bidder's library is provided.)

INFORMATION	PRIMARY CONTACT	SECONDARY CONTACT (If requested)
Name:		
Title/Role:		
Phone Number:		
E-Mail:		

Provide two (2) contacts who will need access to the State's file sharing site for uploading the proposal (Refer to [SECTION 5.3. DELIVERY OF SUBMITTALS](#)):

INFORMATION	PRIMARY CONTACT	SECONDARY CONTACT

Provide two (2) contacts who will need access to the State's file sharing site for uploading the proposal (Refer to [SECTION 5.3. DELIVERY OF SUBMITTALS](#)):

Name:		
Title/Role:		
Phone Number:		
E-Mail:		

The Bidder's Authorized Representative or Corporate Officer:

Bidder/Firm Name:	
Printed Name of Authorized Representative:	
Title/Role:	
Phone Number:	
Email:	
Signature:	
Date:	

ATTACHMENT 3: FOLLOW-ON CONTRACT DISCLOSURE FORM

1. BACKGROUND INFORMATION

PCC Section 10365.5 generally prohibits a person, firm, or subsidiary thereof that has been awarded a consulting services contract from submitting a bid for and/or being awarded an agreement for, the provision of services, procurement of goods or supplies, or any other related action that is required, suggested, or otherwise deemed appropriate in the end product of a consulting services contract.

PCC Section 10365.5 does not apply to any person, firm, or subsidiary thereof that is awarded a subcontract of a consulting services agreement that totals no more than 10 percent of the total monetary value of the consulting services agreement.

Consultants/employees of a firm that provides consulting advice under an original consulting contract are not prohibited from providing services as employees of another firm on a follow-on contract, unless the persons are named contracting parties or named parties in a subcontract of the original contract.

PCC Section 10365.5 does not distinguish between intentional, negligent, and/or inadvertent violations. A violation could result in disqualification from bidding, a void contract, and/or imposition of criminal penalties.

1. CONTRACT DISCLOSURE

Bidder to select the appropriate box below.

☐	I hereby certify that neither my firm nor any subcontractor that my firm intends to use under the contract resulting from this procurement, is currently providing consulting services to the state under a state contract (or as a subcontractor providing more than 10 percent of dollar value of a consulting service contract with the state) or has provided such services within five (5) years prior to the release of this solicitation that are related in any manner to the services, goods, or supplies being acquired pursuant to this solicitation. Bidder must sign below. This option is likely to apply to bidding firms that do not currently and/or never have provided consultant services to the state.
☐	Attached is a disclosure of current and/or prior consulting services provided by my firm or a proposed subcontractor to the state under a state contract within five (5) years prior to the release of this solicitation that may be related in some manner to the services, goods, or supplies being acquired pursuant to this solicitation. In addition, provide a detailed explanation why your firm is not prohibited from bidding under PCC Section 10365.5. Please also refer to the Department of General Services'

	Management Memo 07-04 for additional information regarding the follow-on contracting prohibition, which is located at https://www.dgs.ca.gov/Resources/ManagementMemos Bidder must sign below and attach a detailed disclosure.
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The Bidder's Authorized Representative or Corporate Officer:	
Bidder/Firm Name:	
Printed Name of Authorized Representative:	
Title/Role:	
Signature:	
Date:	

ATTACHMENT 4: COVER LETTER

The Bidder must complete and submit this form with its proposal.

COVER LETTER REQUIREMENTS	BIDDER AGREES YES/NO
The Bidder agrees this proposal is an irrevocable offer per SECTION 2.4.11. IRREVOCABLE OFFER .	☐ Yes ☐ No
The Bidder agrees to the terms and conditions of this solicitation and accepts responsibility as the prime contractor if awarded the contract resulting from this solicitation.	☐ Yes ☐ No
The Bidder agrees to having available staff with the appropriate skills to complete the contract for all services as described in this solicitation and SOW.	☐ Yes ☐ No
The Bidder has completed and submitted the eVAQ application and has been deemed approved by OSTP. The Bidder hereby certifies that all information submitted in the eVAQ is true, correct, and complete as of the date of submission, and that such information is incorporated herein by reference and made a part of this bid Bidder shall provide OSTP approved eVAQ number:	☐ Yes ☐ No
This form is signed by an individual who is authorized to bind the bidding firm contractually. The individual's name must also be typed, and include the title or position that the individual holds in the firm. An unsigned bid may be rejected.	☐ Yes ☐ No

Bidder's Information	
Bidding Firm's Legal Name:	
Bidding Firm's Address:	
Printed Name of Authorized Representative:	
Title/Role:	
Address:	
Phone Number:	

Bidder's Information	
Email:	
Signature:	
Date:	

ATTACHMENT 5: RESPONSE TO ADMINISTRATIVE REQUIREMENTS FORM

The Bidder must complete and submit this form by indicating agreement to each of the administrative requirements in the table below as described in +SECTION 3.2. ADMINISTRATIVE REQUIREMENTS. By indicating “Yes,” the Bidder affirms that it understands the requirement and agrees to comply with the requirement. Answering “No” to any of the mandatory administrative requirements in the proposal will deem the Bidder non-responsive and may be the basis for rejecting the Bidder’s proposal.

RFP - SECTION 3.2. ADMINISTRATIVE REQUIREMENTS	BIDDER AGREES YES / NO
SECTION 3.1. PREQUALIFICATION REQUIREMENTS	☐ Yes ☐ No
SECTION 3.2.4. ABILITY TO PERFORM	☐ Yes ☐ No
SECTION 3.2.5. PRIMARY BIDDER	☐ Yes ☐ No
SECTION 3.2.6. SUBCONTRACTORS	☐ Yes ☐ No
SECTION 3.2.7. AMENDMENT	☐ Yes ☐ No
SECTION 3.2.8. FINANCIAL RESPONSIBILITY INFORMATION	☐ Yes ☐ No
SECTION 3.2.9. INCORPORATION OF EVAQ REQUIREMENTS AND REQUIREMENTS	☐ Yes ☐ No
SECTION 3.2.10. GENERAL PROVISIONS	☐ Yes ☐ No
SECTION 3.2.11. GENERATIVE ARTIFICIAL INTELLIGENCE (GENAI) DISCLOSURE NOTIFICATION	☐ Yes ☐ No
SECTION 3.2.12. STATEMENT OF WORK	☐ Yes ☐ No
SECTION 3.2.12.1. INSURANCE COVERAGE	☐ Yes ☐ No
SECTION 3.2.13. PRODUCTIVE USE REQUIREMENTS	☐ Yes ☐ No
SECTION 3.2.14. SOCIOECONOMIC PROGRAMS	☐ Yes ☐ No

ATTACHMENT 6: CONFIDENTIALITY STATEMENT FORM

The Bidder must complete and submit this form with its proposal.

As an authorized representative or corporate officer of the company name below, I have the authority to bind the company contractually, and I agree that all persons employed by this company will adhere to the following policy:

All information belonging to the California Department of Technology (CDT) or its affiliated agencies is considered sensitive and confidential and cannot be disclosed to any person or entity that is not directly approved to participate in the work required to execute this Agreement.

I certify that I will keep all project information including (but not limited to) information concerning the planning, processes, development or procedures of the project, and all communication with CDT or its affiliates related to any procurement process, confidential and secure. I will not copy, give or otherwise disclose such information to any other person unless CDT has on file a Confidentiality Statement signed by the other person(s), and the disclosure is authorized and necessary for the project. I understand that the information to be kept confidential includes, but is not limited to, specifications, administrative requirements, terms and conditions, concepts and discussions, as well as written and electronic materials. I further understand that if I leave this project before it ends, I must still keep all project information confidential. I agree to follow any instructions provided by the project relating to the confidentiality of project information.

I fully understand that any unauthorized disclosure I make may be basis for civil and/or criminal penalties. I agree to advise the Procurement Officer immediately in the event of an unauthorized disclosure, inappropriate access, misuse, theft or loss of data.

I warrant that if my company is awarded the Contract, it will not enter into any agreements or discussions with a third party concerning such materials prior to receiving written confirmation from the State that such third party has an agreement with the State similar in nature to this one.

All materials provided for this Project, except where explicitly stated will be promptly returned or destroyed, as instructed by the Procurement Officer. If the materials are destroyed and not returned, a letter attesting to their complete destruction, which documents the destruction procedures, must be sent to the Procurement Officer before payment can be made for services rendered. In addition, all copies or derivations, including any working or archival backups of the information, will be physically and/or electronically destroyed within five (5) calendar days immediately following either the end of the Contract period or the final payment, as determined by the contracting Agency/state entity.

In addition to all the confidentiality requirements set forth in the General Provisions, upon Contract award,

Bidder to submit a signed confidentiality statement from all personnel, agents, and subcontractors assigned to the awarded Contract.

The Bidder's Authorized Representative or Corporate Officer:	
Bidder/Firm Name:	
Printed Name of Authorized Representative:	
Title/Role:	
Phone Number:	
Email:	
Signature:	
Date:	

ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105

In accordance with [SECTION 3.2.6.1. BIDDER DECLARATION FORM \(M\)](#) , the Bidder must complete and submit with its proposal the Bidder Declaration GSPD-05-105 form.

The form and its instructions are available as a fill and print PDF at: <https://www.documents.dgs.ca.gov/dgs/fmc/gspd/gspd05-105.pdf>

ATTACHMENT 8: WORKERS' COMPENSATION CERTIFICATION

The Bidder must complete and submit this form with its proposal.

The undersigned in submitting this document hereby certifies the following:

I am aware of the provisions of Section 3700 of the California Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with such provisions before commencing the performance of the work of this Contract.

The Bidder's Authorized Representative or Corporate Officer:	
Bidder/Firm Name:	
Printed Name of Authorized Representative:	
Title/Role:	
Signature:	
Date:	

ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES

The Bidder must complete all of the sections below and submit with its proposal.

1. SMALL BUSINESS PREFERENCE:

Bidder must check the appropriate box from the choices below.

SMALL BUSINESS PREFERENCE	
☐	I am a DGS certified Small Business and claim the Small Business Preference. My DGS Small Business certification number is:
☐	I have recently filed for DGS Small Business certification. I have not yet been certified, but I am claiming the Small Business Preference.
☐	I am not a DGS certified Small Business, but 25% or more of the net bid price will go to a DGS certified Small Business subcontractor(s) performing a Commercially Useful Function and therefore, I am claiming the Small Business preference. Bidder must complete and submit ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105 , indicating the percentage of the net bid price that will be received by each DGS certified Small Business subcontractor. The form can be found at the following link: https://www.documents.dgs.ca.gov/dgs/fmc/gspd/gspd05-105.pdf
☐	I am not claiming the Small Business Preference.

2. DVBE INCENTIVE:

Bidder must check the appropriate box from the choices below.

DVBE INCENTIVE:	
☐	I am a DGS certified DVBE and claim the DVBE Incentive. My DGS DVBE certification number is:
☐	I have recently filed for DGS DVBE certification. I have not yet been certified, but I am claiming the DVBE Incentive.

DVBE INCENTIVE:	
☐	I am not a DGS certified DVBE, but a percentage of the net bid price will go to a DGS certified DVBE subcontractor(s) performing a Commercially Useful Function and therefore, I am claiming the DVBE Incentive. Bidder must complete and submit a ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105, indicating the percentage of the net bid price that will be received by each DGS certified DVBE subcontractor. The Bidder must also complete and submit an ATTACHMENT 10: DVBE DECLARATIONS , for each DVBE subcontractor, signed by the DVBE owner/manager. The forms can be found at the following links: https://www.documents.dgs.ca.gov/dgs/fmc/gspd/gspd05-105.pdf https://www.documents.dgs.ca.gov/dgs/fmc/gspd/pd/pd_843.pdf
☐	I am not claiming the DVBE Incentive.

3. TARGET AREA CONTRACTOR PREFERENCE ACT (TACPA):
Bidder must check the appropriate box from the choices below.

TACPA PREFERENCE:	
☐	I am not claiming the TACPA Preference.
☐	I am claiming the TACPA Preference. Bidder must complete and submit TACPA PREFERENCE REQUEST FORMS. The forms can be found at the following link: https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Request-Target-Area-Contract-Preference?search=tacpa

ATTACHMENT 10: DVBE DECLARATIONS

In accordance with +SECTION 3.14.2. DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PROGRAM, the Bidder must complete and submit with its proposal the STD. 843, Disabled Veteran Business Enterprise Declarations form.

The form and its instructions are available as a fill and print PDF at: https://www.documents.dgs.ca.gov/dgs/fmc/gs/pd/pd_843.pdf

ATTACHMENT 11: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION

The Bidder must complete and submit this form with its proposal.

Bidder name
Subcontractor Name (submit one form for each SB/DVBE (prime and/or subcontractor(s)))

Mark all that apply: ☐ DVBE ☐ Small Business ☐ Micro Business

All certified small business (SB), micro business (MB), 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.

Answer questions 1-5 below, as they apply to your company for the goods and/or services being acquired in this solicitation. A California certified SB, MB, or DVBE business must be deemed to perform a Commercially Useful Function (CUF) by meeting **ALL** of the following CUF requirements for Contract award consideration.

CUF Requirements			
1.	Is responsible for the execution of a distinct element of the resulting Contract.	Yes ☐	No ☐
2.	Carries out its obligation by actually performing, managing, or supervising the work involved.	Yes ☐	No ☐
3.	Performs work that is normal for its business services and functions.	Yes ☐	No ☐
4.	Is responsible, with respect to products, inventories, materials, and supplies required for the Contract, for negotiating price, determining quality and quantity, ordering, installing, if applicable, and making payment. If this is a SERVICE with NO goods involved, check N/A and go to #5.	Yes ☐	No ☐ or N/A ☐
5.	Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.	Yes ☐	No ☐

If the answer to any of the five (5) questions is “NO” (except for #4 when marked with “N/A”), may result in your proposal being deemed non-responsive.

The Bidder must provide a written statement below detailing the role, services and goods the subcontractor(s) will provide to meet the commercially useful function requirement. If the Bidder is not claiming a SB or DVBE, indicate “Not claiming a preference” in the box below.

Written Statement or Statement of No Claim

At the State’s option prior to award, the Bidder may be required to submit additional written clarifying information.

By signing this form, the undersigned Bidder certifies that the Certified Small Business or DVBE satisfies the Commercially Useful Function requirement, and will provide the role, services, and/or goods stated above.

The Bidder's Authorized Representative or Corporate Officer:	
Printed Name of Authorized Representative:	
Title/Role:	
Signature:	
Date:	

ATTACHMENT 12: BIDDER QUALIFICATIONS FORM - INSTRUCTIONS

The Bidder must complete [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#) with the qualifying project information being used to meet the mandatory qualifications (and if applicable, desirable qualifications) as required for this project. A separate [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#) must be completed for each project used to meet the mandatory qualifications.

[ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#) will be used by to evaluate Bidder's qualifications. The Bidder must specify the required experience in the pertinent row for each requirement in [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#). Use additional forms as needed to complete each response. Any conflicting information may result in the proposal being deemed non-responsive.

For the purposes and context of the Bidder qualifications forms and reference forms only, the term "Project" is defined as an individual effort or contract where the Bidder was the Prime Contractor on the cited contract.

Box 1, Bidder: Provide the company name of the Bidder submitting the proposal.

Box 2, Project Name: Provide the name of the qualifying project used to meet the required experience.

Box 3, Name of Company for whom the project was completed: Identify the company or government agency for whom the project was completed.

Box 4, Contact name and information of the Bidder's reference. Identify the contact information from whom the project was completed. Enter the name, title, e-mail address, and phone number for the reference contact for the project. By submitting a proposal, the Bidder declares that the reference person identified is/was employed by the company identified in Box 3. This reference must be the same person identified in the [ATTACHMENT 14: BIDDER REFERENCE FORM](#). This person must have been:

- From the end user of the development project.
- In a management or supervisory role for the project.
- Not from another contractor or contracting company.
- Not be an employee of the bidding company.
- Not be an employee of BOE or CDTFA.

Boxes 5 and 6, Start Date and End Date: Provide the start and end date that the Bidder worked on the cited project using MM/DD/YYYY format.

- All experience must have occurred within the last seven (7) years prior to the final proposal due

date, unless stated otherwise.

- For projects that are currently ongoing, experience will be calculated only for the work performed up to the final proposal due date.

Box 7, Project Description: Provide a brief description of the nature of the Bidder's cited project

Box 8, Bidder was Prime Contractor: Check the appropriate response, "Yes" or "No". If the "No" box is checked, time spent on that project will not count towards Bidder experience.

Box 9, Contract Amount: Provide the dollar amount of the contract value in US dollars.

Box 10, Instructions for documenting the years of experience gained from the project cited.

Note: It is the Bidder's responsibility to ensure that each mandatory experience requirement is met in full and is addressed in the Bidder qualification forms in order for the State to determine compliance to the requirements. If the State cannot determine that the years of experience for each of the mandatory experience requirements have been met, Bidder's proposal may be deemed non-responsive.

Definitions:

1. **Bidder References:** A reference that was in a management or supervisory role for an external organization (external to the Bidder's organization and corporate structure) for whom the project was completed.
2. **Client:** Defined the same as customer.
3. **Completed Implementation:** A solution that has received system acceptance from the customer and is in a production environment.
4. **Complex IT project:** A multi-segmented environment consisting of two or more disparate sites/ locations.
5. **Customer:** An external organization who receives and pays for goods or services.
6. **Large-scale:** Is defined as greater than 1,000 users.
7. **Government:** inclusive of local, state, or national entities.

ATTACHMENT 13: BIDDER QUALIFICATIONS FORM

The Bidder may use multiple projects to meet the total experience required for each mandatory experience and, if applicable, desirable experience. A separate form must be completed for each project cited.

BIDDER QUALIFICATION FORM		
1	Bidder:	
2	Project Name:	
3	Name of Company for whom the Project was completed:	
4	Contact Name and Information of the Bidder's Reference:	
5	Start Date (MM/DD/YYYY):	
6	End Date (MM/DD/YYYY):	
7	Project Description:	
8	Bidder was Prime Contractor	☐ Yes ☐ No
9	Contract Amount:	\$
10	Documenting instructions when a minimum number of years of experience is required. For each mandatory experience listed below, • Check "Yes" if the total years of experience was met on this referenced project; or • Check "Partial" if fewer than the total years of the experience was met on this referenced project; or • Check "No" if none of the experience was met on this referenced project. If partial or yes is checked, enter the years and/or months of "Experience gained on this referenced project" and describe the Bidder's role and responsibilities performed on the project in the "Description of services provided" field. The Bidder must ensure that each description clearly addresses how the project meets each of the minimum qualification components of the Mandatory Experience Requirement, as defined in each of the	

	requirements.
--	---------------

Classification	Qualifications	Total Experience Required	Experience gained on this cited Project
Mandatory (M)	Four (4) years out of the last seven (7) years' of experience integrating large-scale and complex application architecture in a government data center.	4 Years	☐ Yes Yr. ____ Mo. ____ ☐ Partial Yr. ____ Mo. ____ ☐ No
Provide a description of the work performed on the cited project and how it meets this requirement:			

ATTACHMENT 14: BIDDER REFERENCE FORM

Purpose: Based on the satisfaction ratings received from the Bidder's references, the State will use the ratings to score the Bidders.

Instructions to Bidder: Complete Part A, items 1-8 of this form, attach the corresponding [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#) and send to references to complete Part B, items 9-13. Once this form is completed, the Bidder must submit it with its proposal.

The Bidder must complete and submit a Reference Form for each corresponding project cited on [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#).

Instructions to the Bidder's Reference: Complete Part B, items 9-13 of this form using the rating scale Yes or No. Rate your satisfaction with the Bidder who performed the services described in item 8, Project Description and the Bidder's role on the project, and confirm that the information in Part A is consistent and corresponds with [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#) attached. Complete the bottom of this form and return the form to the Bidder.

PART A: TO BE COMPLETED BY BIDDER		
1	Bidder:	
2	Project Name:	
3	Name of Company for whom the Project was completed:	
4	Contact Name and Information of the Bidder's Reference:	
5	The Bidder was the Prime Contractor for this Project:	☐ Yes ☐ No
6	Bidder's Start and End Dates on the Project:	
7	Contract Amount:	\$
8	Project Description & Bidder's role on the project:	
PART B: TO BE COMPLETED BY BIDDER'S REFERENCE		

PART A: TO BE COMPLETED BY BIDDER		
9	Were you satisfied with the Bidder's ability to perform system implementation activities?	Yes ☐ No ☐
10	Were you satisfied with the Bidder's ability to meet project milestones and/or timelines?	Yes ☐ No ☐
11	Were you satisfied with the effectiveness of the Bidder's change management (e.g., scope, requirements, etc.) process?	Yes ☐ No ☐
12	Were you satisfied with the Bidder's willingness and ability to accommodate your organization's working style and constraints?	Yes ☐ No ☐
13	Were you satisfied with the Bidder's overall performance?	Yes ☐ No ☐

By completing this reference form, I declare the following:

1. I have reviewed the information contained in Part A, items 1-8 above, and [ATTACHMENT 13: BIDDER QUALIFICATIONS FORM](#) and the information is true and correct;
2. I am/was employed by the company for whom the project was completed; and
3. I performed a management or supervisory role on the cited project.

TO BE COMPLETED BY BIDDER'S REFERENCE	
Signature:	
Printed Name:	
Date:	
Title or role on the project:	
Email:	
Phone:	

ATTACHMENT 15: KEY STAFF QUALIFICATIONS FORM - INSTRUCTIONS

The Bidder must complete and submit each Key Staff Qualification Form with the qualifying project information being used to meet the mandatory qualifications and if applicable, desirable qualifications as required for this project. A separate Key Staff Qualification Form must be completed for each project used to meet the mandatory qualifications.

The Key Staff Qualification Form will be used by the State to evaluate Key Staff qualifications. The Bidder must specify the required experience in the pertinent row for each requirement in the Key Staff Qualification Forms. Use additional forms as needed to complete each response. Any conflicting information may result in the proposal being deemed non-responsive.

"Project" is defined as an individual effort or contract where the key staff played a role on the cited contract.

Box 1, Bidder: Provide the company name of the Bidder submitting the proposal.

Box 2, Key Staff Name: Provide the name of the Bidder's proposed key staff.

Box 3, Project Name: Provide the name of the qualifying project in which the proposed staff gained experience to meet the requirement(s).

Box 4, Name of Company for whom the Project was completed: Provide the company or government agency for whom the project was completed.

Box 5, Contact Name and Information of the Key Staff's Reference: Provide the contact information from whom the project was completed. Enter the name, title, e-mail address and phone number for the reference contact for the project. By submitting a proposal, the Bidder declares that the reference person identified is/was employed by the company identified in Box 4. The reference must be the same person identified in the Key Staff Reference Form. This person must have been:

- From the end user of the development project.
- In a management or supervisory role for the project.
- Not from another contractor or contracting company.
- Not be an employee of the bidding company.
- Not be an employee of *BOE* or *CDTFA*.

Boxes 6 and 7, Staff Start Date and End Date: Provide the start and end dates the key staff worked on the cited project using MM/DD/YYYY format.

- All experience must have occurred within the last seven (7) years prior to the solicitation due date, unless stated otherwise.
- For projects that are currently ongoing, experience will be calculated only for the work performed up to the solicitation due date.

Box 8, Full-time/Part-time: Check the appropriate box for time proposed staff worked on the cited project. Refer to [SECTION 3.3.3.1. FULL-TIME/PART-TIME MONTH EQUIVALENTS DEFINITION](#) for additional details on calculating experience.

Box 9, Project Description: Provide a brief description of the nature of the proposed staff's cited project.

Box 10, Contract Amount: Provide the dollar amount of the contract value in US dollars.

Box 11, Instructions for documenting the years of experience gained from the project cited.

Note: It is the Bidder's responsibility to ensure that each mandatory experience requirement is met in full and is addressed in the Key Staff qualification forms in order for the State to determine compliance to the requirements. If the State cannot determine that the years of experience for each of the mandatory experience requirements have been met, Bidder's proposal may be deemed non-responsive.

Definitions:

1. **Key Staff References:** A reference that was in a management or supervisory role for an external organization (external to the Bidder's organization and corporate structure) for whom the project was completed.
2. **Client:** Defined the same as customer.
3. **Completed Implementation:** A solution that has received system acceptance from the customer and is in a production environment.
4. **Complex IT project:** A multi-segmented environment consisting of two or more disparate sites/locations.
5. **Customer:** An external organization who receives and pays for goods or services.
6. **Large-scale:** Is defined as greater than 1000 users.
7. **Government:** inclusive of local, state, or national entities.

ATTACHMENT 15.1: PROJECT MANAGER KEY STAFF QUALIFICATIONS FORM

The Bidder may use multiple projects to meet the total experience required for each mandatory experience and, if applicable, desirable experience. A separate form must be completed for each project cited.

KEY STAFF QUALIFICATIONS FORM		
1	Bidder:	
2	Key Staff Name:	
3	Project Name:	
4	Name of Company for whom the Project was Completed:	
5	Contact Name and Information of Proposed Key Staff's Reference:	
6	Key Staff Start Date (MM/DD/YYYY):	
7	Key Staff End Date (MM/DD/YYYY):	
8	Key Staff Work Schedule	☐ Full-time ☐ Part-time
9	Project Description:	
10	Contract Amount:	\$
11	Documenting instructions when a minimum number of years of experience is required. For each mandatory experience listed below,	

KEY STAFF QUALIFICATIONS FORM	
	- Check “Yes” if the total years of experience was met on this referenced project; or - Check “Partial” if fewer than the total years of experience was met on this referenced project; or - Check “No” if none of the experience was met on this referenced project. If "Partial" or "Yes" is checked, enter the years and/or months of “Experience gained on this referenced project” and describe the Key Staff’s role and responsibilities performed on the project in the “Description of services provided” field. The Bidder must ensure that each description clearly addresses how the work performed on the project meets each of the minimum qualification components of the Mandatory Experience Requirement, as defined in each of the requirements.

Classification	Qualifications	Total Experience Required	Experience gained on this cited project
Mandatory (M) Pass/Fail	The Project Manager shall have seven (7) years of experience applying PM principles, methods, techniques, and tools., with four (4) of those years of experience as a Senior Project Manager on a large IT project.	7 Years	Yes ☐ No ☐ Partial ☐ Yr.____ Mo.____
Provide a description of the work performed on the cited project and how it meets this requirement:			

Classification	Qualifications	Total Experience Required	Experience gained on this cited project

Desirable Scored (2 points for each year of experience up to 5 years)	The Project Manager shall have experience managing a project where the State Agency's IT infrastructure is managed by another State Agency as a service provider for IT Services.		Yes ☐ No ☐ Partial ☐ Yr.____ Mo.____
Provide a description of the work performed on the cited project and how it meets this requirement:			

ATTACHMENT 15.2: TECHNICAL LEAD KEY STAFF QUALIFICATIONS FORM

The Bidder may use multiple projects to meet the total experience required for each mandatory experience and, if applicable, desirable experience. A separate form must be completed for each project cited.

KEY STAFF QUALIFICATIONS FORM		
1	Bidder:	
2	Key Staff Name:	
3	Project Name:	
4	Name of Company for whom the Project was Completed:	
5	Contact Name and Information of Proposed Key Staff's Reference:	
6	Key Staff Start Date (MM/DD/YYYY):	
7	Key Staff End Date (MM/DD/YYYY):	
8	Key Staff Work Schedule	☐ Full-time ☐ Part-time
9	Project Description:	
10	Contract Amount:	\$
11	Documenting instructions when a minimum number of years of	

KEY STAFF QUALIFICATIONS FORM	
	experience is required. For each mandatory experience listed below, • Check “Yes” if the total years of experience was met on this referenced project; or • Check “Partial” if fewer than the total years of experience was met on this referenced project; or • Check “No” if none of the experience was met on this referenced project. If "Partial" or "Yes" is checked, enter the years and/or months of “Experience gained on this referenced project” and describe the Key Staff’s role and responsibilities performed on the project in the “Description of services provided” field. The Bidder must ensure that each description clearly addresses how the work performed on the project meets each of the minimum qualification components of the Mandatory Experience Requirement, as defined in each of the requirements.

Classification	Qualifications	Total Experience Required	Experience gained on this cited project
Mandatory (M) Pass/Fail	The Technical Lead shall have a bachelor’s degree or equivalent certification in Computer Science, Information Technology, Computer Engineering, Information Systems, Mathematics, or related field. If your education was completed outside the United States, your transcript must be accompanied by an evaluation performed by a member of the National Association of Credential Evaluation Services	Attach Copy of Degree	NA

	(NACES).		
Mandatory (M) Pass/Fail	The Technical Lead shall have four (4) years of experience as a Technical Lead on a large IT project within the last seven (7) years.	4 years	Yes ☐ No ☐ Partial ☐ Yr.____ Mo.____
Provide a description of the work performed on the cited project and how it meets this requirement:			

Classification	Qualifications	Total Experience Required	Experience gained on this cited project
Mandatory (M) Pass/Fail	The Technical Lead shall have two (2) years of experience developing applications hosted on a cloud system.	2 years	Yes ☐ No ☐ Partial ☐ Yr.____ Mo.____
Provide a description of the work performed on the cited project and how it meets this requirement:			

Classification	Qualifications	Total Experience Required	Experience gained on this cited project
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Mandatory (M) Pass/Fail	The Technical Lead shall have a minimum of five (5) years' experience working on projects that are similar size and scope to this RFP, managing technical software development teams for all development, maintenance and architecture initiatives, and ensuring adherence to overall IT architecture and design.	5 years	Yes ☐ No ☐ Partial ☐ Yr.____ Mo.____
Provide a description of the work performed on the cited project and how it meets this requirement:			

Classification	Qualifications	Total Experience Required	Experience gained on this cited project
Mandatory (M) Pass/Fail	The Technical Lead shall have a minimum of five (5) years' experience working on projects that are similar size and scope, performing complex database queries, administering data governance, data conversions, and data analysis.	5 years	Yes ☐ No ☐ Partial ☐ Yr.____ Mo.____
Provide a description of the work performed on the cited project and how it meets this requirement:			

Classification	Qualifications	Total Experience Required	Experience gained on this cited project
Desirable Scored (4 points for each year of experience up to 5 years and 20 points)	The Technical Lead shall have a minimum of one (1) year experience using Infrastructure as code (IAC) in projects that are similar size and scope to STARS Solution .	1-5 years	Yes ☐ No ☐ Partial ☐ Yr.____ Mo.____
Provide a description of the work performed on the cited project and how it meets this requirement:			

ATTACHMENT 16: KEY STAFF REFERENCE FORM

Purpose: Based on the satisfaction ratings received from the proposed Key Staff's references, the State will use the ratings to score the Key Staff.

Instructions to Bidder: Complete Part A, items 1-8 of this Key Staff Reference Form, attach the corresponding Key Staff Qualifications Form and send to references to complete Part B, items 9-12. Once the Key Staff Reference Form is completed, the Bidder must submit it with its proposal.

The Bidder must complete and submit a Key Staff Reference Form for each of the projects cited on the corresponding Key Staff Qualification Form.

Instructions to the Key Staff's Reference: Complete Part B, items 9-12 of this form using the rating scale in "Reference Satisfaction Rating" field (item 9). Rate your satisfaction with the Key Staff who performed the services described in item 8, Project Description & Key Staff's role on the project, and confirm that the information in Part A is consistent and corresponds with the corresponding Key Staff Qualification Form attached. Complete the bottom of this Attachment and return the form to the Bidder.

PART A: TO BE COMPLETED BY BIDDER		
1	Bidder:	
2	Key Staff Name:	
3	Project Name:	
4	Name of Company for whom the Project was completed:	
5	Contact Name and Information of the Key Staff's Reference:	
6	Key Staff's Start and End Dates on the Project:	
7	Contract Amount:	\$
8	Project Description & Key Staff's role on the project:	
PART B: TO BE COMPLETED BY KEY STAFF'S REFERENCE		
9	Were you satisfied with the individual's overall performance?	Yes ☐ No ☐
10	Was the individual effective at communicating in writing?	Yes ☐ No ☐

PART A: TO BE COMPLETED BY BIDDER		
11	Was the individual effective in dealing with conflicting priorities?	Yes ☐ No ☐
12	Were you satisfied with the individual's skills?	Yes ☐ No ☐

By completing this reference form, I declare the following:

1. I have reviewed the information contained in Part A, items 1-8 above, and the corresponding Key Staff Qualifications Form and the information is true and correct;
2. I am/was employed by the company for whom the project was completed; and
3. I performed a management or supervisory role on the cited project.

TO BE COMPLETED BY PROPOSED KEY STAFF'S REFERENCE	
Signature:	
Printed Name:	
Date:	
Title or role on the project:	
Email:	
Phone:	

Purpose: Based on the satisfaction ratings received from the proposed Key Staff's references, the State will use the ratings to score the Key Staff.

Instructions to Bidder: Complete Part A, items 1-8 of this Key Staff Reference Form, attach the corresponding Key Staff Qualifications Form and send to references to complete Part B, items 9-12. Once the Key Staff Reference Form is completed, the Bidder must submit it with its proposal.

The Bidder must complete and submit a Key Staff Reference Form for each of the projects cited on the

corresponding Key Staff Qualification Form.

Instructions to the Key Staff's Reference: Complete Part B, items 9-12 of this form using the rating scale in "Reference Satisfaction Rating" field (item 9). Rate your satisfaction with the Key Staff who performed the services described in item 8, Project Description & Key Staff's role on the project, and confirm that the information in Part A is consistent and corresponds with the corresponding Key Staff Qualification Form attached. Complete the bottom of this Attachment and return the form to the Bidder.

PART A: TO BE COMPLETED BY BIDDER		
1	Bidder:	
2	Key Staff Name:	
3	Project Name:	
4	Name of Company for whom the Project was completed:	
5	Contact Name and Information of the Key Staff's Reference:	
6	Key Staff's Start and End Dates on the Project:	
7	Contract Amount:	\$
8	Project Description & Key Staff's role on the project:	
PART B: TO BE COMPLETED BY KEY STAFF'S REFERENCE		
9	Were you satisfied with the individual's overall performance?	Yes ☐ No ☐
10	Was the individual effective at communicating in writing?	Yes ☐ No ☐
11	Was the individual effective in dealing with conflicting priorities?	Yes ☐ No ☐
12	Were you satisfied with the individual's skills?	Yes ☐ No ☐

By completing this reference form, I declare the following:

1. I have reviewed the information contained in Part A, items 1-8 above, and the corresponding Key Staff Qualifications Form and the information is true and correct;
2. I am/was employed by the company for whom the project was completed; and
3. I performed a management or supervisory role on the cited project.

TO BE COMPLETED BY PROPOSED KEY STAFF'S REFERENCE	
Signature:	
Printed Name:	
Date:	
Title or role on the project:	
Email:	
Phone:	

ATTACHMENT 17: NARRATIVE RESPONSE

The Bidder must provide a brief narrative describing their understanding of and approach to the questions/topics below. In preparing a response to the Narrative, do not simply restate or paraphrase information in this solicitation and the SOW. Describe or demonstrate, in the Bidder's own words, the information required below. The response descriptions and explanations should be straightforward, detailed, and precise. Responses will be evaluated as stated in [SECTION 6. EVALUATION](#).

The Bidder may submit diagrams to support each narrative response. The diagrams shall be visual representations of the narrative response. One (1) page is defined as one (1) side of a physical sheet of letter size (8.5" x 11") paper regardless of single side or double-sided printing.

The Bidder's narrative response:

1. Shall be delivered in PDF format, use a 11-point, Century font for normal text and use one-inch margins.
2. Shall not exceed 150 pages totals. Pages must include page numbers. If the Bidder submits more than the 150 page limit, only the first 150 pages will be reviewed and evaluated.

Each Narrative Response must adhere to the instructions specified in +SECTION 3.4.3. NARRATIVE REQUIREMENTS (MS), contain the content as shown on this attachment, and include the following:

1. Table of Contents (not included in page limit)
2. Separate headings to delineate sections (aligned with the Table of Contents)
3. Formatting to ensure greater ease of evaluation, by:
 - a. Use of bold headings and sub-headings to easily locate information
 - b. Use of sub-headings or bullets to address each requirement or element listed for each narrative
 - c. Use of tables for each project described to summarize relevant information
 - d. Use of tables to highlight other relevant content for the narrative sub-sections
 - e. Use of graphics to enhance readability of response
 - f. Avoid use of acronyms
 - g. Provide glossary at the end of each narrative if non-standard terminology is used

The Bidder shall respond to each of the questions below:

1. Describe how you will create and structure (417.15 Points)

- A taxpayer e-file web portal for tax schedule submissions to reduce email, USPS mail, and fax.
- A case management to better facilitate BOE taxpayer account management to reduce account research and management hours.
- A paperless business workflow environment to reduce paper and USPS mailing costs.
- A low cost of ownership of the Solution

2. Describe an example of automating and streamlining a State's tax computations, allocation computations, and tax collections per given business rules to ensure ease of user interaction and reduce manual intervention. (278.10 Points)
3. If you had the same budget and timeline as your competitors, what would you do differently that sets you apart? (278.10 Points)
4. Explain how you would architect a land appraisal assignment and appraisal progress tracking system for land parcels across California's 58 counties. Your response must include details for a specific county with 152 land parcels and 7 appraisers. (250.29 Points)
5. In the STARS solution, what feature or capability would you implement to assist a BOE auditor, appraiser, or tax specialist in creating ad hoc calculations outside the e-file tax schedule template to account for unique or unexpected circumstances? (250.29 Points)
6. Describe how you would architect the various data storage elements to produce a long-term, robust, scalable centralized data storage system to meet the needs of the various data and file types for my tax valuation business for the STARS Solution. (222.48 Points)
7. Describe how you will enable and augment the BOE's data governance plan to implement data ownership, data stewardship, and data custodial curating of all data access, data cleansing, and data validation, with appropriate data categorization accompanied by a comprehensive metadata strategy. (194.67 Points)
8. Provide an example that demonstrates how you have increased the quality of audits and appraisals by prioritizing and improving workflow efficiency, tracking, reporting, and archiving. (166.86 Points)
9. How will you provide the technical description on how the Solution will scale to meet the expected demand over time, without limitation of any physical onsite hardware, human intervention, or Solution resources during disasters or high-demand events, while maintaining 99.999% availability. (166.86 Points)
10. How do you handle unexpected issues, change orders, or cost overruns during a project? (139.05 Points)
11. Why should BOE choose your company specifically for this project instead of another contractor? (139.05 Points)
12. What problems do you typically encounter on projects like mine, and how do you plan for them before they happen? (111.24 Points)
13. Having read the RFP and SOW introduction and background information, provide your proposed STARS development and implementation schedule to complete in 18 months. Indicate any assumptions/dependencies used. (83.43 Points)

14. Provide an example of how you implemented broadband connectivity for a solution you developed and implemented.(55.62 Points)

15. Describe the tools or methods you will use to provide data visualization capabilities for report generation and dashboard monitoring of the State's Key Performance Indicators (KPI) and workflow task progress, respectively. (27.81 Points)

ATTACHMENT 18: KEY STAFF REPLACEMENT FORM

CONTRACTOR NAME:			Date:
Agreement Number:		Project Name:	
Key Staff to be Added	Key Staff Replaced	Proposed Effective Date	Key Staff Position
Reason for Substitution/Comments:			
- Proposed Key Staff Qualifications Attached (see ATTACHMENT 15.1: PROJECT MANAGER KEY STAFF QUALIFICATIONS FORM and ATTACHMENT 15.2: TECHNICAL LEAD KEY STAFF QUALIFICATIONS FORM) - Proposed Key Staff Qualification Form/Resume Attached			
State Acceptance		Contractor Acceptance	
Printed Name of Authorized Representative:		Printed Name of Authorized Representative:	
Signature of Authorized Representative:		Signature of Authorized Representative	
Title:		Title:	
Contact Information (phone number &		Contact Information (phone number & email	

email address):

address):

ATTACHMENT 19: WORK ORDER AUTHORIZATION FORM

The following deliverables will be produced in accordance with this Work Authorization and the provisions of Agreement Number 2026-11001.

PART 1: GENERAL INFORMATION	
Contractor Name:	
<Enter Department>:	
Work Authorization Number:	
Work Authorization Category: (Unanticipated Task, Additional Reports):	

PART 2: WORK AUTHORIZATION DESCRIPTION	
Purpose/Objective/Goal:	
Schedule of Activities/Tasks:	
State Responsibilities:	
Acceptance Criteria:	
Payment Model (Fixed Fee, Actual Hours with Not to Exceed, No Cost):	
Payment Provisions	

PART 2.1 PERSONNEL					
Del ID#	Name of Personnel	Classification	Total Hours	Hourly Rate	Total Cost

PART 2.1 PERSONNEL					
01				\$	\$
02				\$	\$
Minus 20% Withhold:					<\$>
Maximum Total					\$

PART 2.2 Deliverable description			
Del #	New/Modified Deliverable Description	SOW Reference	Deliverable ID#
01			
02			

Part 3: APPROVAL SIGNATURES	
CONTRACTOR APPROVAL	STATE APPROVAL
Printed Name of Authorized Representative:	Printed Name of Authorized Representative:
Signature of Authorized Representative:	Signature of Authorized Representative:
Title:	Title:
Date of Approval:	Date of Approval:

Part 3: APPROVAL SIGNATURES

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ATTACHMENT 20: WORK ORDER AUTHORIZATION ACCEPTANCE FORM

PART 1: GENERAL INFORMATION	
Contractor Name	
<Enter Department and Agreement #>	
Work Authorization Number	

PART 2: LIST OF COMPLETED DELIVERABLES	
Del #	Deliverable Name/Description
01	
02	

PART 3: APPROVAL SIGNATURE(S)	
The Deliverables listed in Part 2 are:	
☐ Approved as is.	
☐ Denied – Does not meet expectations.	Explain Denial:
CONTRACTOR APPROVAL	STATE APPROVAL
Printed Name of Authorized Representative:	Printed Name of Authorized Representative:
Signature of Authorized Representative:	Signature of Authorized Representative:
Title:	Title:

PART 3: APPROVAL SIGNATURE(S)	
Date of Approval:	Date of Approval:

ATTACHMENT 21: DELIVERABLE EXPECTATION DOCUMENT

DELIVERABLE EXPECTATION DOCUMENT	
Deliverable Number:	Deliverable Title:
Deliverable Owner(s):	Submission Date:
Section 1: Delivery Requirements:	
1. Provide the medium of delivery (e.g. 1 hardcopy and 1 electronic copy uploaded to SharePoint). 2. Provide all the formats used for the deliverable (e.g. Microsoft Word 2013 and Visio 2013). 3. Provide State Review Period.	
Section 2: Deliverable Content Requirement:	
1. List all the specific contractual requirements for this deliverable. 2. Provide any assumptions/constraints related to the deliverable. 3. If applicable, list any other agreed upon requirements and the source of the requirements (i.e. meetings and discussions with date, time, and State resource name)	
Section 3: Delivery Description/Purpose:	
1. Describe the deliverable's objectives and scope and development methodology/approach. 2. Provide a detailed outline of the deliverable mapped to contractual requirements. 3. Provide an outline of the deliverable. 4. Discuss the content of each major section of the document outline. 5. Identify all tasks required and estimated completion dates required for the deliverable. 6. Describe any applicable standards and/or industry or government best practices.	
Section 4: Roles/Resources Required:	
Identify the State and Contractor resources and required skills/knowledge involved in the deliverable preparation and review.	
Section 5: Deliverable Acceptance Criteria	

DELIVERABLE EXPECTATION DOCUMENT

1. List specific acceptance criteria for the deliverable. The minimum acceptance criteria for a deliverable:
 - Adhere to DED
2. List specific entry criteria or required deliverable predecessors.

Section 6: Deliverable Payment Details

1. Identify the payment schedule/breakdown as applicable for this deliverable.
2. Identify the cost as identified in the [EXHIBIT E: COST WORKBOOK](#) .
3. Withholds, if applicable.

Section 7: Deliverable Expectation Document Approvals

This DED was completed according to contract requirements of contract # 2026-11001

CONTRACTOR APPROVAL	STATE APPROVAL
Printed Name of Authorized Representative:	Printed Name of Authorized Representative:
Signature of Authorized Representative:	Signature of Authorized Representative:
Title:	Title:
Date:	Date:

ATTACHMENT 22: DELIVERABLE ACCEPTANCE DOCUMENT

DELIVERABLE ACCEPTANCE DOCUMENT	
Contractor Name:	
Contract Number:	
DAD Number:	
Deliverable #:	
Deliverable Title:	
Deliverable Completion Date:	
Total Cost of Approved Deliverable:	\$
Deliverable Description:	
State Department's Acceptance or Rejection:	

AUTHORIZED AND APPROVED:

CONTRACTOR APPROVAL	STATE APPROVAL
Printed Name of Authorized Representative:	Printed Name of Authorized Representative:
Signature of Authorized Representative:	Signature of Authorized Representative:
Title:	Title:
Date:	Date:

Note: The Contractor may submit an invoice to the Board of Equalization but payment will not be issued until the Project Sponsors have approved the DAD.

ATTACHMENT 23: GLOSSARY OF TERMS

1. GLOSSARY OF TERMS

Definitions, Acronyms, and Abbreviations

TERM/ACRONYM	DEFINITION
Agency/State entity	Agency: When used lower case (agency), refers to any office, department, board, bureau, commission or other organizational entity within state government. When capitalized (Agency), the term refers to one of the state's super agencies such as the State and Consumer Services Agency or the Health and Human Services Agency. State Entity: Any entity within the executive branch that is under the direct authority of the Governor, including, but not limited to, all agencies, departments, boards, bureaus, commissions, councils, institutions, offices, or other distinct governmental organization not specifically exempted from adherence to the legal and regulatory requirements related to information security and privacy set forth herein.
Agreement	A legally binding obligation or contract by whatever name known or in whatever format used (including purchase orders), between the State and another entity, public or private, for the provision of goods or services.
Bidder	1. A supplier who submits, or has identified their intention to submit, a bid to the State in response to a solicitation. 2. An individual, sole proprietorship, firm, partnership, corporation, or any other business venture that responds to a solicitation.
Commercial Off-The-Shelf (COTS)	A computer hardware or software product that is ready-made for specific uses and available for sale to the general public. COTS products are designed to be installed without requiring custom development. For example, Microsoft Office is a COTS product that is a packaged software solution for businesses and individuals. The set of rules for COTS is defined by the Federal Acquisition Regulation (FAR).

Contract	A legally binding obligation or agreement by whatever name known or in whatever format used (including purchase orders), between the State and another entity, public or private, for the provision of goods or services.
Contractor	The business entity with who the State enters into a contract.
Custom Solution	Typically, computer software developed for a specific customer to accommodate the customer's particular requirements, preferences, and expectations.
Proposal	An offer made in response to a Request for Proposals (RFP). Also referred to as a Bid and response.
Functional Requirements	Functional requirements represent the business objectives, needs and outcomes of all stakeholders. They should be organized and presented in context of and with a baseline business process/workflow that they describe. They provide a description of what an enabling solution should provide and specifies essential details of a solution for stakeholders as a means to express and manage expectations. They describe actions and operations that the solution must be able to perform. They can describe services, reactions, and behaviors of the solution. They also describe information the solution will manage. The requirements should be expressed in business terms and should not include any technical references. The requirement should identify “what” is required to meet the business objective, not “how” the requirement will be implemented.
Immaterial Deviation	A deviation can be accepted by the State when it is determined to be of such a minor concern that it carries little or no importance, and by accepting it, it doesn't provide the bidder with any material advantage over other bidders. Example: A bidder referenced the wrong page in their supporting technical literature. The bidder directed the evaluator to page 4 and the correct page should have been page 5.
Material Deviation	A deviation in the bid response that cannot be accepted by the State because it is not in substantial accord with the solicitation requirements, provides an advantage to one bidder over other bidders, or has a potentially significant effect on the delivery, quantity, or quality of items bid, amount

	paid to the Contractor, or on the cost to the State. Material deviations cannot be waived. Example: The solicitation required a system that would serve 500 users and the bidder only offered a system that would serve 250 users.
Modified Off-The-Shelf (MOTS)	Typically, a COTS product with source code made available to the purchaser to allow for modifications. The product may be customized by the purchaser, by a vendor, or by another party to meet the requirements of the customer. Since MOTS product specifications are written by external sources, purchasers may not have control of future changes to the product.
Non-Functional Requirements	Non-functional requirements provide criteria to evaluate the operation of an enabling solution and primarily represent qualities of (expectations and characteristics) and constraints on (e.g., governmental regulations) the solution. They capture conditions that do not directly relate to the behavior or functionality of the solution, but rather describe environmental conditions of an effective solution or productive qualities of the solution. Mid-level non-functional requirements also define quality of service requirements, such as those relating to required capacity, speed, security, privacy, availability, response time, throughput, usability, and the information architecture and presentation of the user interfaces.
Open Source Software/ Code	Software that includes distribution terms that comply with the following criteria provided by the Open-Source Initiative. The open source definition used here is from the Open Source Initiative and is licensed under a Creative Commons Attribution 2.5 License (http://creativecommons.org/licenses/by/2.5/) 1. Free Redistribution: The software can be given as part of a package with other applications; 2. Source Code: The code must either be distributed with the software or easily accessible; 3. Derived Works: The code can be altered and distributed by the new author under the same license conditions as the product on which it is based; 4. Integrity of the author's source code: Derived works must not

	interfere with the original author's intent or work; 5. No discrimination against persons or groups; 6. No discrimination against fields of endeavor: Distributed software cannot be restricted in who can use it based on their intent; 7. Distribution of license: The rights of the program must apply to all to whom the program is re-distributed without need for an additional license; 8. License must not be specific to a product; Meaning that an operating system product cannot be restricted to be free only if used with another specific product; 9. License must not contaminate other software; and 10. License must be technology-neutral.
Project/Transitional Requirements	Project/transition requirements describe capabilities that the solution must have in order to facilitate the transition from the current state of the enterprise to a desired future state. Mid-level project/transition requirements are differentiated from other requirement types because they are usually temporary in nature and will not be needed once the transition is complete. They typically cover process requirements imposed through the Contract, such as mandating a particular design method, administrative requirements, data conversion and migration from existing systems, interfaces, skill gaps that must be addressed, and other related changes required to reach the desired future state.
Responsive Bidder	A Bidder whose solicitation response is compliant with the solicitation requirements and indicates performance without material deviation from the terms and conditions of the proposed contract.
Responsible Bidder	A Bidder who is fully capable of performing the contract. Considerations include a supplier deemed to satisfactorily demonstrate some or all of the following, pertinent to the specific transaction: 1. The capability to comply with the required or proposed delivery or performance schedule considering all existing commitments; 2. A satisfactory record of performance; 3. A satisfactory record of integrity; 4. Qualified and eligible to receive an award under all applicable laws and regulations; and/or 5. Necessary organization, experience, operational controls and

	technical skills (or the ability to obtain them). A Bidder is responsible if they possess the experience, facilities, reputation, financial resources and are fully capable of performing the contract.
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