
CalHEERS Bidders Conference

RFP #73040873

October 15, 2025



Welcome / Conference Purpose

California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)



Request for Proposal For CalHEERS SDMO

OTSI CalHEERS SMDO RFP #73040873

September 17, 2025

**California Health and Human Services Agency
Offices of Technology and Solutions Integration**

- **Welcome!**
 - You made it to the CalHEERS Bidders Conference!
 - We are excited you are here & hope it will be of great value
 - Don't forget to Sign-in
- **Bidder Conference Purpose**
 - Cover details to help you develop a sound proposal.
 - Encourage competition and partnering.

Bidders Conference Agenda

A. Part 1 – Administrative

1. Housekeeping Details
2. Procurement Background
3. Opening Remarks from State Executives

B. Part 2 – Overview/Important Areas of the RFP

1. Overall RFP Structure
2. RFP Introduction
3. Proposal Preparation Guidance
4. Proposal Evaluation, Negotiation, BAFO, Award
5. General, Special, Federal Provisions
6. Statement of Work / System Rqmts Specification
7. Bidders' Library Content, Access & Submitting Questions

C. Part 3 – CalHEERS and Governance Structure

1. CalHEERS Governance
2. Functional & Technical Overview
3. SDLC Methodologies and Release Cycles

D. Part 4 – Question & Answer / Wrap-Up

1. Break & Submission of Questions
2. Response to Submitted Questions
3. What's Next



Part 1 - Administrative



Housekeeping Details



Housekeeping Details

- Must Sign in on the Sign-in sheet
- Facilities / Emergency exits / Silence your cell phones
- Video or audio recordings are not permitted
- Transcriptions will not be provided or allowed
- Today's presentation will be posted to Cal eProcure, and we've printed some hard-copies for you
- If you cannot hear the speaker, please let us know
- Question Sheets are Provided
 - Write your Company/Question(s) on the sheet → place in box
 - Ensure questions are legible w/appropriate detail
 - We will address some questions later in today's session

NOTE: Oral statements or responses made today are non-binding and are subject to change

Procurement Background

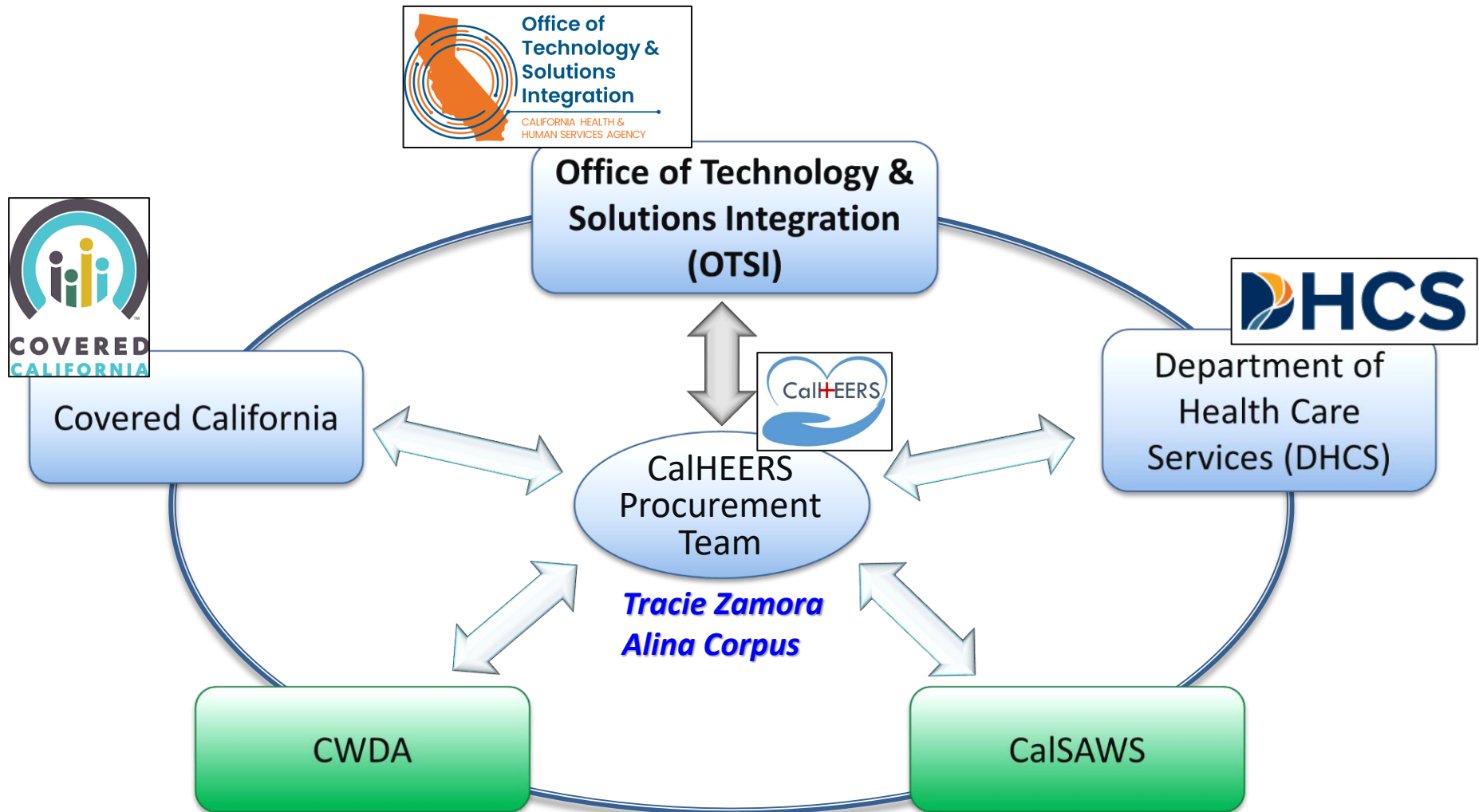


Procurement Background

- History of CalHEERS
 - CalHEERS was initiated in 2012 in response to the Affordable Care Act (ACA) signed into law in March of 2010.
 - The new system was rolled into production in October of 2013.
- Current CalHEERS System Integrator (SI) Contract
 - The contract is with Deloitte Consulting LLP.
 - Term: September 16, 2019 - June 30, 2027
- Current Procurement Activities to Date
 - Request for Information (RFI) – May 2024
 - Pre-Solicitation - Mar 2025
 - Request for Proposal (RFP) - Sep 2025
 - Bidder Conference - Oct 2025

Procurement Background (cont.)

The Partners in this Procurement



Opening Remarks from State Executives



Opening Remarks from Our Executive Team

Project Mgmt

Navin Arora



SPONSORS

Linh Huynh



Yingjia Huang



CONSUMERS (Californians)

- Unsubsidized Healthcare consumers
- Alternative Premium Tax Credit (APTC) consumers
- Modified Adjusted Gross Income (MAGI) Medi-Cal consumers
- Non-MAGI Medi-Cal consumers

Interface Partners

- SAWS
- MEDS
- Federal Hub
- FTB
- EDD

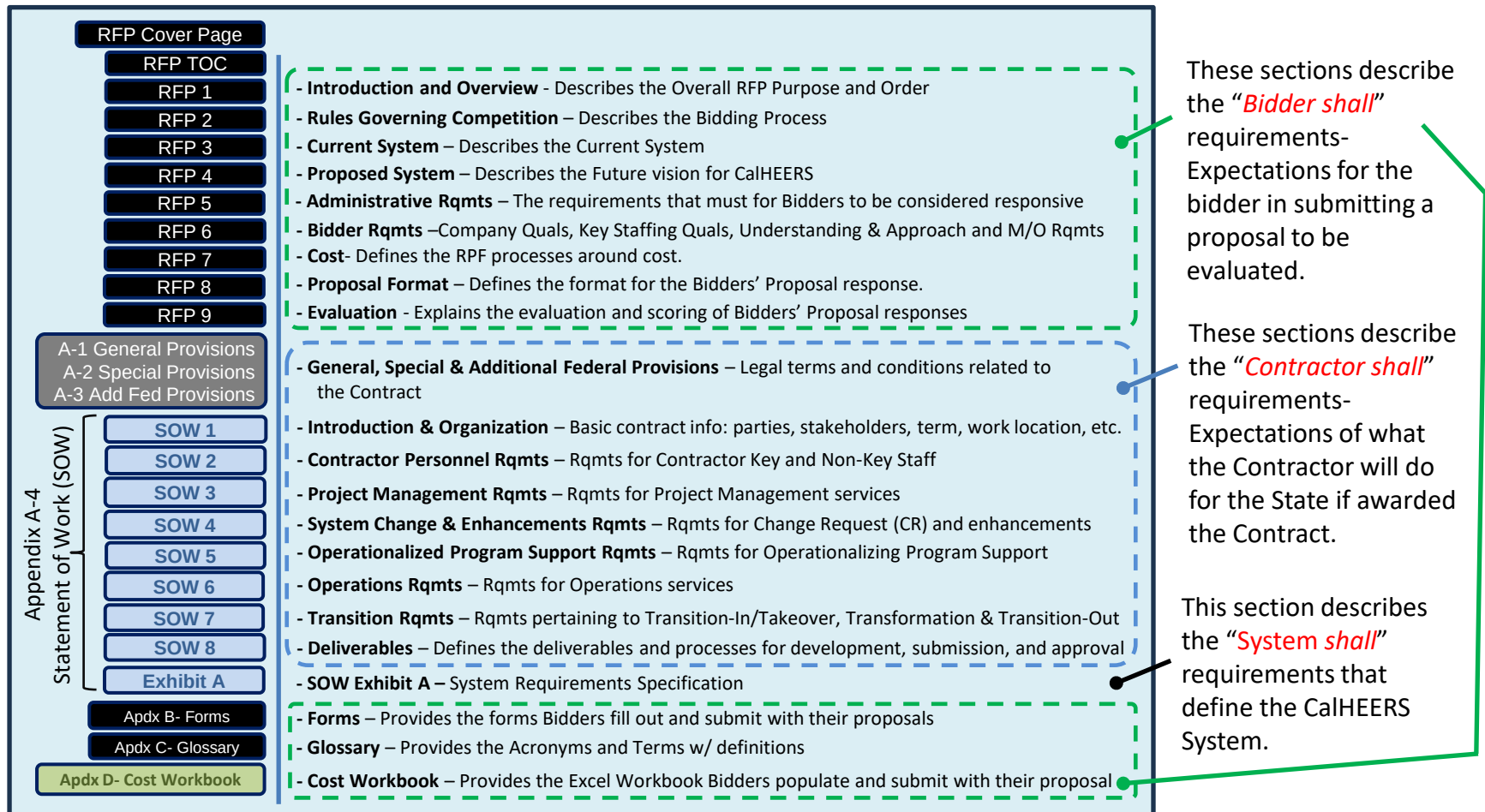
Part 2 – Overview/ Important Areas of the RFP



Overall RFP Structure



Overall Request for Proposal (RFP) Structure



RFP Introduction

RFP 1 – Introduction & Overview

RFP 2 – Rules Governing Competition

RFP 3 – Current System

RFP 4 – Proposed System



RFP Instructions

RFP Section 1 – Introduction and Overview

Table of Contents

1	INTRODUCTION AND OVERVIEW
1.1	Purpose.....
1.2	Scope of Solicitation.....
1.2.1	Negotiation Process
1.2.2	Bidder Admonishment.....
1.2.3	Availability
1.2.4	Financial Stability
1.2.5	Americans with Disabilities Act
1.3	Term of Contract
1.4	Key Action Dates and Times.....
1.4.1	Mandatory Bidders Conference
1.4.2	Intention to Bid
1.5	Procurement Official and Contact Information
1.5.1	General E-mail Inquiries.....
1.5.2	Deliveries by Mail
1.5.3	Access to Bidders' Library/Submit RFP Question or Request for Change.....
1.6	Bidders' Library.....
1.6.1	Use and Purpose

- The solicitation is being conducted under California Government Code (GC) 100505
- Evaluation/Negotiation Process
- Term of Contract:
 - Five (5) Base Years
 - (5x) One (1) Year Options
- Key Action Dates:
 - Intent to Bid due by 10/22/2025
 - Last day to submit questions 11/3/2025
 - Proposal due by 5:00PM PT, 1/5/2026
- Bidders' Library (we'll discuss later)

RFP Instructions

RFP Section 2 – Rules Governing Competition

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2	RULES GOVERNING COMPETITION.....
2.1	IDENTIFICATION AND CLASSIFICATION OF REQUIREMENTS..
2.1.1	Requirements.....
2.1.2	Desirable Items
2.2	BIDDING REQUIREMENTS AND CONDITIONS.....
2.2.1	General
2.2.2	Irrevocable Offer
2.2.3	RFP Document.....
2.2.4	Examination of Work.....
2.2.5	Questions Regarding the RFP
2.2.6	Mandatory Bidders Conference
2.2.7	Intention to Bid
2.2.8	Addenda.....
2.2.9	Bonds
2.2.10	Discounts
2.2.11	Loss Leader
2.2.12	Joint Venture Submittals
2.2.13	Fair Employment and Housing Commission Regulations.....
2.2.14	Exclusion of Conflict of Interest.....
2.2.15	Seller's Permit.....
2.2.16	Disclosure of Financial Interests.....
2.2.17	Unfair Practices Act and Other Laws
2.2.18	Plastic Trash Bag Certification Violations
2.2.19	Air or Water Pollution Violations
2.3	BIDDING STEPS
2.3.1	Negotiations
2.3.2	Compliance Phase (Not Applicable)
2.3.3	Confidentiality.....
2.3.4	Submission of Proposals.....
2.3.5	Rejection of Proposals
2.3.6	Evaluation and Selection Process
2.3.7	Protests
2.3.8	Award of Contract
2.3.9	Debriefing.....
2.4	CONTRACTUAL INFORMATION
2.4.1	Contract Form
2.4.2	Specific Terms and Conditions (Not applicable).....
2.4.3	Approval of Proposed Contract.....
2.4.4	Contacts for Information.....

RFP Instructions

RFP Section 3 – Current System & RFP Section 4 – Proposed System

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3	CURRENT SYSTEM
3.1	INTRODUCTION
3.1.1	Background
3.1.2	Oversight Agencies
3.1.3	CalHEERS Project Overview
3.2	CALHEERS SYSTEM OVERVIEW
3.2.1	CalHEERS Architecture
3.2.2	System Functionality
3.3	CALHEERS STAFFING RESOURCES
3.3.1	CalHEERS State and System Integrator (SI) Staff
3.3.2	CalHEERS State and SI Key Staff
3.3.3	State and SI Non-Key Staff
3.4	PROJECT MANAGEMENT
3.4.1	Schedule Management
3.4.2	Cost / Cost Estimating Management
3.4.3	Human Resources Management
3.4.4	Risk and Issue Management
3.4.5	Communication Management
3.4.6	Document Management
3.4.7	Incident / Problem Management
3.4.8	Contract Requirements Management
3.4.9	Quality Management
3.4.10	SI / Subcontractor Management
3.4.11	CalHEERS Strategic Planning and Management
3.4.12	Policy & Legislative Impact Analysis and Change Management
3.4.13	Audit Evaluation and Findings Services
3.5	System Change & Enhancements
3.5.1	System / Software Development Lifecycle
3.5.2	Change Management
3.5.3	Change / Refresh / Upgrades
3.5.4	System Requirements Management
3.5.5	Release Management
3.5.6	Testing
3.5.7	Defect Management
3.6	Program Support Services
3.6.1	Insurance Carrier Support
3.6.2	Website Management
3.6.3	Consumer Journey
3.6.4	Annual Renewal and Open Enrollment
3.6.5	IRS / CMS Reporting and 1095 Processing
3.6.6	CalHEERS 3895 Processing
3.6.7	CalHEERS Project Processes
3.6.8	CalHEERS Application Training
3.6.9	CalHEERS Data Warehousing, Analytics, and Reporting
3.7	Operations
3.7.1	CalSAWS Collaboration
3.7.2	Medi-Cal Eligibility Data System (MEDS) Interface
3.7.3	System Security
3.7.5	Forms Support
3.7.6	Service Center Services
3.8	Project Closeout

Forward
Vision



Table of Contents

4	PROPOSED SYSTEM
4.1	INTRODUCTION
4.1.1	Overview
4.1.2	CalHEERS Vision
4.1.3	CalHEERS Strategic Roadmap
4.1.4	Opportunities for Transformation
4.2	CONTRACTOR STAFFING
4.2.1	Updates to Key and Non-Key Staffing
4.2.2	Updates Onsite/Offsite Staffing & Onshore/Offshore Activities
4.2.3	Hybrid Remote Work Environment
4.3	PROJECT MANAGEMENT
4.3.1	Updates to Schedule Management
4.3.2	Updates to Cost/Cost Estimation
4.3.3	Updates to Staffing Management
4.3.4	Updates to Communication
4.3.5	Updates to Document Management & Contract Management
4.3.6	Updates to Quality Management
4.3.7	Access to Enterprise Tools
4.3.8	Enhancing Strategic Planning and Management
4.3.9	Policy & Legislative Impact Analysis and Change Support
4.3.10	Updates to Audit Evaluation and Findings Services
4.4	SYSTEM CHANGE & ENHANCEMENTS
4.4.1	Updates the CalHEERS Solution to keep it Relevant
4.4.2	Updates to Strategic Planning
4.4.3	Updates to System/Software Development Lifecycle
4.4.4	Updates to Change Management and Configuration Management
4.4.5	Staffing for Innovation
4.4.6	Updates to Defect Management
4.5	PROGRAM SUPPORT
4.5.1	Updates to Program Support Services
4.5.2	Operationalizing Processes
4.5.3	Print and Mail Support
4.5.4	General Innovations
4.5.5	Data & Analytics Innovations
4.5.6	Consumer Journey & Experience Innovations
4.5.7	Artificial Intelligence Innovations
4.5.8	Organizational Innovations
4.5.9	Security Innovations
4.6	OPERATIONS
4.6.1	Effective/ Efficient Operations
4.6.2	Updates to the CalHEERS Infrastructure
4.6.3	Updates to Capacity Management
4.6.4	Updates to Interface Support Activities
4.6.5	Updates to Technical Refresh
4.6.6	Updates to Security
4.6.7	Operations Service Delivery
4.6.8	Website Management
4.7	TRANSITION
4.7.1	Transition-In Phase 1 (TIP1) - Takeover
4.7.2	Transition-In Phase 2 (TIP2) - Transformation
4.7.3	Transition-Out

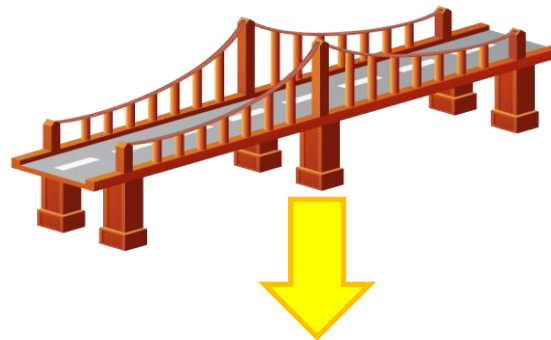
RFP Instructions

RFP Section 3 & RFP Section 4 (cont.)

Bridging RFP 3 → RFP 4

3	CURRENT SYSTEM
3.1	INTRODUCTION
3.1.1	Background
3.1.2	Overview Agencies
3.1.3	CalHEERS Project Overview
3.2	CALHEERS SYSTEM OVERVIEW
3.2.1	CalHEERS Architecture
3.2.2	System Functionality
3.3	CALHEERS STAFFING RESOURCES
3.3.1	Staffing Overview
3.3.2	Staffing Requirements
3.3.3	Staffing Resources
3.4	OPERATIONS
3.4.1	Effective/Efficient Operations
3.4.2	Updates to the CalHEERS Infrastructure
3.4.3	Updates to Capacity Management
3.4.4	Updates to Introduce Support Activities
3.4.5	Updates to Technical Refresh
3.4.6	Updates to Security Delivery
3.4.7	Website Management
3.4.8	Transition
3.4.9	Transition in Phase 1 (TIP1) Takeover
3.4.10	Transition in Phase 2 (TIP2) Transformation
3.4.11	Transition-Out
3.5	TRANSITION
3.5.1	Transition Overview
3.5.2	Transition in Phase 1 (TIP1) Takeover
3.5.3	Transition in Phase 2 (TIP2) Transformation
3.5.4	Transition-Out
3.5.5	Transition-Out
3.5.6	Transition-Out
3.5.7	Transition-Out
3.6	PROJECT CLOSEOUT
3.6.1	Project Closeout Overview
3.6.2	Project Closeout Requirements
3.6.3	Project Closeout Resources
3.6.4	Project Closeout Schedule
3.6.5	Project Closeout Reporting and 1095 Processing
3.6.6	CalHEERS Staff Processing
3.6.7	CalHEERS Project Processes
3.6.8	CalHEERS Application Training
3.6.9	CalHEERS Data Warehousing, Analytics, and Reporting
3.7	OPERATIONS
3.7.1	CalHEERS Collaboration
3.7.2	Multi-Cal Eligibility Data System (MEDS) Interface
3.7.3	System Security
3.7.4	Forms Support
3.7.5	Service Center Services
3.8	PROJECT CLOSEOUT

RFP 3 –
Current
System



4	PROPOSED SYSTEM
4.1	INTRODUCTION
4.1.1	Overview
4.1.2	CalHEERS Strategic Roadmap
4.1.3	Opportunities for Transformation
4.2	CONTRACTOR STAFFING
4.2.1	Updates to Key and Non-Key Staffing
4.2.2	Updates to Onsite/Offsite Staffing & Onshore/Offshore Activities
4.2.3	Update to Onsite Work Environment
4.3	OPERATIONS
4.3.1	Effective/Efficient Operations
4.3.2	Updates to the CalHEERS Infrastructure
4.3.3	Updates to Capacity Management
4.3.4	Updates to Introduce Support Activities
4.3.5	Updates to Technical Refresh
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4.3.7	Website Management
4.4	TRANSITION
4.4.1	Transition Overview
4.4.2	Transition in Phase 1 (TIP1) Takeover
4.4.3	Transition in Phase 2 (TIP2) Transformation
4.4.4	Transition-Out

RFP 4 –
Proposed
System

Req #	SOW Requirement
3.1.2-01 (new)	The Contractor shall provide CalHEERS as directed by the Project Manager.
3.1.2-02 (new)	The Contractor shall collaborate with the Project Manager to develop the Artifacts necessary to support the Artifacts Repository and management.
3.1.2-03 (existing)	Upon Contract award, the Contractor shall develop the project management plans and procedures.
3.1.2-04 (modified)	The Contractor shall provide the Project Manager with the Technology & Support Services best practices for the current system.

← RFP 4 – Proposed System

RFP 3 – Current System →

← RFP 4 – Proposed System

Proposal Preparation Guidance

RFP 5 – Administrative Requirements
RFP 6 – Bidder Requirements
RFP 7 – Cost
RFP 8 – Proposal Format
RFP Appendix B – Forms
RFP Appendix D – Cost Workbook



Proposal Preparation Guidance

RFP Section 5 – Administrative Requirements

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5.1	INTRODUCTION.....
5.2	CONFIDENTIALITY (M).....
5.3	PRODUCTIVE USE REQUIREMENTS
5.4	BIDDER RESPONSIBILITY
5.5	INSTALLATION
5.6	CONDITIONS TO BE EXAMINED (NOT APPLICABLE).....
5.7	SPECIAL SPECIFIC MAINTENANCE REQUIREMENTS (NOT APPLICABLE).....
5.8	DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PARTICIPATION (M).....
5.9	DEVELOPMENT/CONVERSION (NOT APPLICABLE).....
5.10	CONTRACTOR'S LICENSE (NOT APPLICABLE).....
5.11	PUBLIC WORKS REQUIREMENTS (INSTALLATION ONLY) (NOT APPLICABLE) ...
5.12	TARGET AREA CONTRACT PREFERENCE ACT (TACPA) (NOT APPLICABLE) ...
5.13	OTHER ADMINISTRATIVE REQUIREMENTS.....
5.14	ADDITIONAL EQUIPMENT PURCHASES (M)
5.15	BIDDER PERFORMANCE RESPONSIBILITY
5.16	STATEMENT OF WORK COMPLIANCE REQUIREMENTS (M)
5.17	BIDDER (COMPANY) QUALIFICATION (M).....
5.18	BIDDER (COMPANY) REFERENCE FORMS (M).....
5.19	KEY STAFF QUALIFICATIONS FORMS (M).....
5.20	KEY STAFF REFERENCE FORMS (M).....

- Letter of Bondability
- Insurance:
 - Commercial General Liability
 - Technology Professional Liability/Errors and Omissions
 - Cyber Liability Insurance
- Preferences & Incentives
 - 3% DVBE Incentive (Mandatory)
 - Small Business (Optional)
- The Appendix B-2: Proposal Submission Checklist, will help organize your proposal.

Proposal Preparation Guidance

RFP Section 6 – Bidder Requirements

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6	BIDDER REQUIREMENTS
6.1	Introduction.....
6.1.1	Qualification Requirements.....
6.1.2	Technical Requirements
6.1.3	Cost Requirements
6.2	Bidder (Company) Qualifications & References.....
6.2.1	Bidder (Company) Qualification Requirements
6.2.2	Bidder (Company) Reference Requirements
6.3	Bidder Key Staff Qualifications & References
6.3.1	Bidder Key Staff Qualification Requirements
6.3.2	Bidder Key Staff Reference Requirements.....
6.4	Understanding and Approach Requirements
6.4.1	Understanding and Approach to Project Management Requirements
6.4.2	Understanding and Approach to System Change & Enhancements
6.4.3	Understanding and Approach to Program Support Requirements.....
6.4.4	Understanding and Approach to Operations Requirements.....
6.4.5	Understanding and Approach to Transition-In Requirements
6.5	Mandatory/Optional Requirements
6.5.1	Effort Driven Schedule Management.....
6.5.2	Operationalized Service Enhancements
6.6	Cost Requirements.....

- 8 Company Mandatory Qualifications (MQ)
- 17 Key Staff Roles w/ MQ and Desirable Qualifications (DQ)
- Note that Section 6.4 is organized by SOW Section
- 2 Mandatory/Optional Rqmts
- Fill out the Cost Workbook

Proposal Preparation Guidance

RFP Section 8 – Proposal Format

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8	PROPOSAL FORMAT
8.1	INTRODUCTION
8.2	PROPOSAL CONTENT
8.3	VOLUME I – RESPONSE TO ADMINISTRATIVE AND BIDDER REQUIREMENTS
8.3.1	Table of Contents
8.3.2	Section 1 – Cover Letter and Executive Summary
8.3.3	Section 2 – Administrative Response
8.3.4	Section 3 – Bidder Response
8.4	VOLUME II – COMPLETED CONTRACT.....
8.5	VOLUME III – COST DATA
8.6	ADDITIONAL FORMAT AND SUBMISSION INSTRUCTIONS.....
8.6.1	Documentation Formatting Standards.....
8.6.2	Physical Proposal Binding and Tabs.....
8.6.3	Electronic Proposal Format and Searchability.....
8.6.4	Master Copy
8.6.5	Confidential or Proprietary Information.....
8.6.6	Packaging and Labeling
8.6.7	Date, Time and Address of Submittals

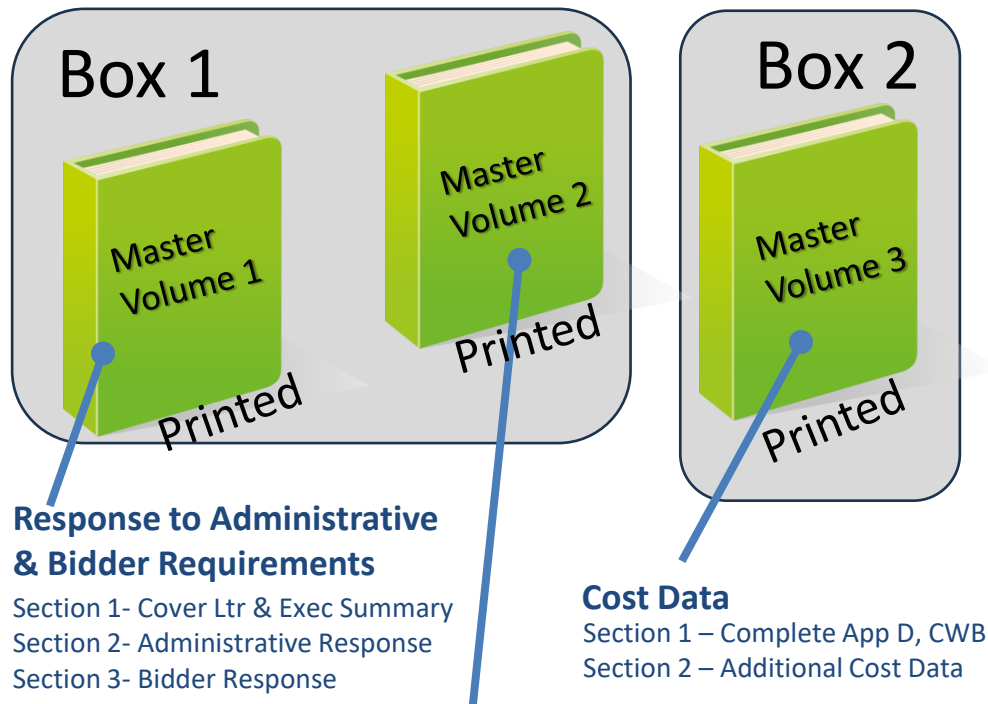
- Proposal Format
 - Review for instructions on how to submit your proposal.
 - Forms - Order of submission
 - Documentation Formatting Standards
 - Packaging and Labeling Rqmts
 - 1 hard copy proposal – marked “Master”
 - Email the Electronic Copy of the proposal in PDF
 - [Cost Workbook \(CWB\) via Excel](#)
- Reminder that Bidder’s proposal must not include information marked as confidential or proprietary to ensure it is not excluded from consideration.

Proposal Preparation Guidance

RFP Section 8 – Proposal Format (cont.)

Proposal Packaging

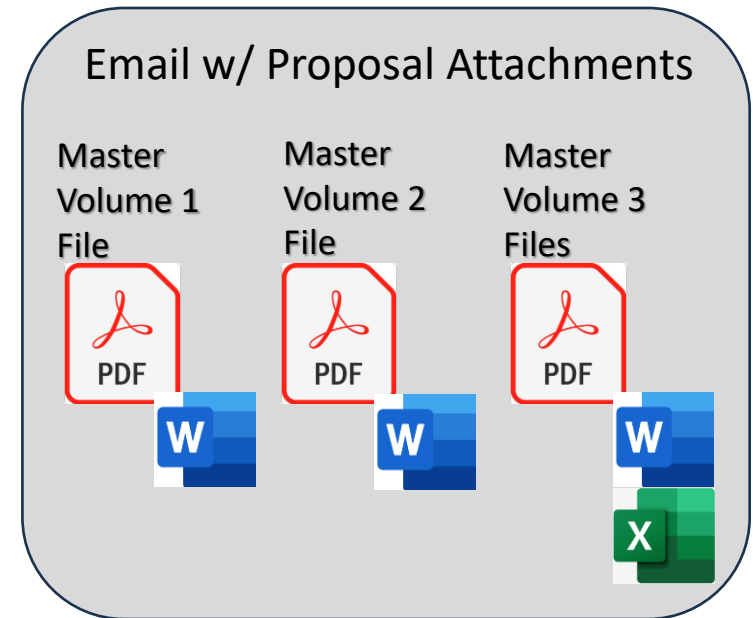
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Completed Contract

- Section 1 – Appendix A, STD 213 IT Std Agreement
- Section 2 – Appendix A-1, General Provisions
- Section 3 – Appendix A-2, Special Provisions
- Section 4 – Appendix A-3, Federal Provisions
- Section 5 – Appendix A-4, Statement of Work (SOW)

ELECTRONIC COPY



The Proposal Packing will be clarified in
Addendum 1 (RFP 8)

Proposal Preparation Guidance

RFP Appendix B - Forms

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Appendix B-2: Proposal Submission Checklist	
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Appendix B-4: Confidentiality Statement Form	
Appendix B-5: Access Authorization Form	
Appendix B-6: Response to Administrative Requirements Form	
Appendix B-7: Workers' Compensation Certification Form.....	
Appendix B-8: GSPD-05-105 Bidder Declaration Form.....	
Appendix B-9: STD 843 DVBE Declarations Form	
Appendix B-10: Bidding Preferences and Incentives Form	
Appendix B-11: Commercially Useful Function Certification Form	
Appendix B-12: Secretary of State Certification.....	
Appendix B-13: Seller's Permit	
Appendix B-14: Payee Data Record	
Appendix B-15: Iran Contracting Act of 2010.....	
Appendix B-16: Federal Debarment, Suspension, Ineligibility and Voluntary Exclusion – Certification Form	
Appendix B-17: California Civil Rights Laws Certification.....	
Appendix B-18: Statement of Compliance with SOW Requirements Form	
Appendix B-19: Bidder (Company) Qualifications Instructions & Form	
Appendix B-20: Bidder (Company) Reference Form, Instructions (Part 1 of 2).....	
Appendix B-20: Bidder (Company) Reference Form, Instructions (Part 2 of 2).....	
Appendix B-21: Key Staff Qualifications Instructions.....	
Appendix B-22: Key Staff Qualifications Form.....	
Appendix B-23: Staff Reference Form (Part 1 of 2).....	
Appendix B-23: Staff Reference Form (Part 2 of 2).....	
Appendix B-24: CalHEERS Artificial Intelligence Risk Assessment Form.....	

- Many Forms to be submitted
- Please pay attention to the instructions

Proposal Preparation Guidance

RFP Appendix B (cont.)

Company Qualification Form

Project #1's
Duration

+

Project #2's
Duration

+

Project #3's
Duration

(3) Project #3	
Workplace:	Company EDF
Project Name:	UVW IT Project
Project Description:	Implementation of large IT Project
Applications:	2
COTS:	2
Interfaces:	3
Real-Time Interfaces:	1
Users:	10,000
Dollar Amount:	\$100,000,000
Multi-tiered processing (Y/N):	Y
Consumer or User Facing Front-end (Y/N):	Y
Start Date:	02/01/2012
Finish Date:	12/13/2014
Reference Contact Name:	Rod Jones
(4) Experience	
Experience as it relates to the MQ:	
Company EDF was the System Integrator (SI) for the implementation an ACA Health Benefit Exchange for Company EDF...	
(5) Total Duration:	8 years, 6 months

Proposal Preparation Guidance

RFP Appendix B (cont.)

Key Staff Qualification Form

EXAMPLE ONLY

(1) Key Staff Position:	Enterprise Architecture Manager	
(2) Company Name:	Company ABC	
(3) Proposed Individual's Name:	John Smith	
(4) Mandatory/Desirable Qualification #:	6.3.1-1	
(5) Mandatory/Desirable Qualification:	The Project Manager shall have a minimum of five (5) years' experience within the past ten (10) years, supervising teams of fifty (50) people or greater on projects that involved Large and Complex IT Systems.	
(6) Project #1		
Company Name:	Company ABC	
Project Name:	XYZ IT Project	
# of System End Users:	10,000	
# of Integrated Applications:	3	
# of COTS Integrated:	2	
# of External System interfaces:	8	
# of Real-time Interfaces:	2	
System Value (\$):	\$ 100,000,000	
Multi-tiered processing (Y/N):	Y	
Consumer or User Facing Front-end (Y/N):	Y	
Start/Finish Dates:	01/01/2011 - 12/31/2016	
Percentage of time:	100%	
Reference Contact Name:	Rod Jones	
(7) Relevant Experience		
Role:	Enterprise Architecture Manager	
Description of relevant experience:	Mr. Smith worked on a project tasked that developed widgets. As an Enterprise Architecture manager, Mr. Smith established and used a coherent set of guidelines, architecture principles and governance regimes that provide direction in the design and development of an enterprise's architecture.	

Provide Start and Finish Dates.

Identify the % of staff's time allotted to the project while on it

Proposal Preparation Guidance

RFP Section 7 – Cost

RFP Appendix D – Cost Workbook

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7	COST.....
7.1	INTRODUCTION.....
7.2	COST WORKSHEETS.....
7.3	APPENDIX D-8.3 TRANSITION-OUT PAYMENT COST DETAIL FORMAT AND REQUIREMENTS.....
7.4	COST OPENING.....
7.5	COST EVALUATION

- Cost Types & Terms: (SOW Rqmt #3.3.1-03)
 - Fixed Budget (HW/SW/Host)
 - Fixed Price (SDMO SOW)
 - Fixed Rate (Enhancements)
 - Fixed Unit (Transactions)
 - True Cost (New Term)

Appdx: D-1, Total Cost Summary

Appdx: D-2, Hardware Costs

Appdx: D-3, Software Costs

Appdx: D-4, Cloud Hosting Data Center Services Costs

Appdx: D-5, SDMO Fixed Price Costs (Onshore/Offshore)

Appdx: D-6, Transaction-Based Costs

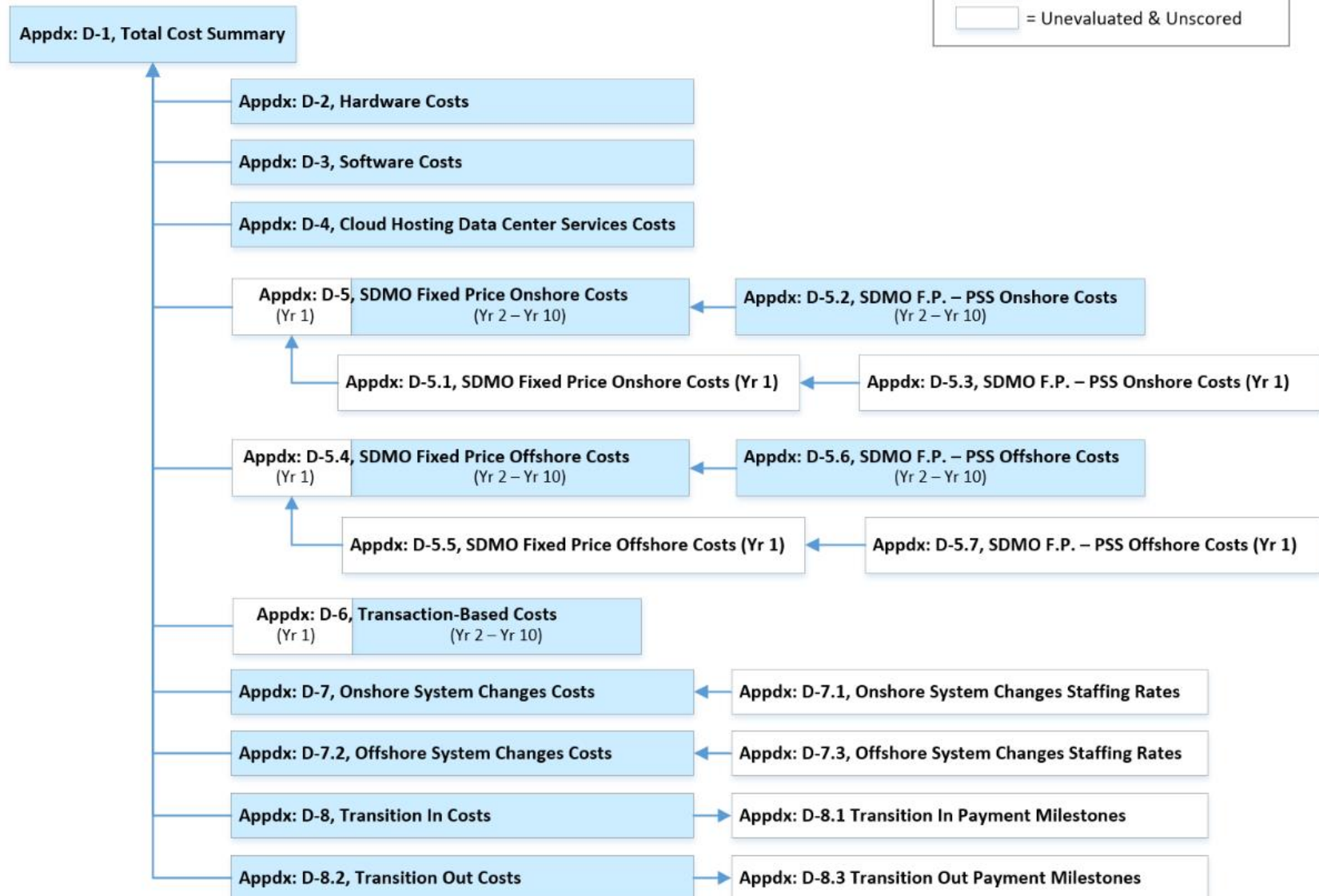
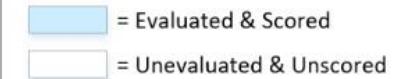
Appdx: D-7, System Changes Costs (Onshore/Offshore)

Appdx: D-8, Transition Costs

Proposal Preparation Guidance

RFP Appendix D – Cost Workbook (cont.)

Legend:



Proposal Preparation Guidance

RFP Appendix D – Cost Workbook (cont.)

Total Cost Summary

APPENDIX D-1, INSTRUCTIONS - TOTAL COST SUMMARY

DO NOT MAKE ANY CHANGES TO THIS WORKSHEET. IT IS FORMULA-DRIVEN AND PULLS COST DATA FROM THE OTHER WORKSHEETS IN THIS WORKBOOK.

Appendix D-1, TOTAL COST SUMMARY, summarizes all the costs associated with the Bidder's proposal, both evaluated and unevaluated, for purposes of the procurement.

Line 1 - Shows Bid Amount A which is assigned an evaluation point value of 2,000 of the total 3,500 cost points. This subtotal includes Lines 2 through 5.

Line 6 - Shows Bid Amount B which is assigned an evaluation point value of 300 of the total 3,500 cost points. This subtotal includes Line 7.

Line 8 - Shows Bid Amount C which is assigned an evaluation point value of 1,000 of the total 3,500 cost points. This subtotal includes Line 9.

Line 10 - Shows Bid Amount D which is assigned an evaluation point value of 200 of the total 3,500 cost points. This subtotal includes Lines 11 and 12.

Line 13 - Shows the Evaluated Contract Costs Subtotals by year and for the total term of the contract.

Lines 14 - Shows the Unevaluated Contract Costs. This Subtotal includes Lines 15 through 18.

Line 19 - Shows the Unevaluated Contract Costs Subtotals by year and for the total term of the contract.

Line 20 - Shows the subtotal of evaluated and unevaluated costs combined for each contract year, as well as the Total Contract Cost (rounded up to the whole dollar).

D-1: Total Cost Summary

1	2	3	4	5	6	7	8	9	10	11	12	13	12
Line #	Cost Category	Source Worksheet	Contract Year 1	Contract Year 2	Contract Year 3	Contract Year 4	Contract Year 5	Contract Year 6 (Option Year 1)	Contract Year 7 (Option Year 2)	Contract Year 8 (Option Year 3)	Contract Year 9 (Option Year 4)	Contract Year 10 (Option Year 5)	Total Cost
1	Bid Amount A (2,000 points)												\$0.00
2	SDMO Hardware (100 pts)	D-2 SDMO Hardware Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00						\$0.00
3	SDMO Software (400 pts)	D-3 SDMO Software Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00						\$0.00
4	SDMO Cloud Hosting (500 pts)	D-4 Cloud Hosting Data Center Services Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00						\$0.00
5	SDMO Fixed Price Services (Yr 2 thru Yr 10) (1,000 pts)	D-5, D-5.4 Fixed Price Costs (On/Off)		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	Bid Amount B (300 points)												\$0.00
7	Transaction-based (Yr 2 through Yr 10)	D-6 Transaction-based Costs		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	Bid Amount C (1,000 points)												\$0.00
9	System Changes	D-7, D-7.2 Sys Change Costs (On/Off)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	Bid Amount D (200 points)												\$0.00
11	Transition-In (TIP1 & TIP2) (100 pts)	D-8 Transition-In (TIP1 & TIP2) Costs	\$0.00										\$0.00
12	Transition Out (100 pts)	D-8.2 Transition-Out Costs										\$0.00	\$0.00
13	EVALUATED CONTRACT COST SUBTOTAL		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14	Unevaluated Contract Costs (0 points)												\$0.00
15	SDMO Fixed Price Services (Yr 1)	D-5.1, D-5.5 (Fixed Price (On/Off) Yr 1)	\$0.00										\$0.00
16	Transaction-Based Costs (Yr 1)	D-6 Transaction-based Costs	\$0.00										\$0.00
17	Performance Bond Costs	D-8 Transition-In (TIP1 & TIP2) Costs	\$0.00										\$0.00
18	Unanticipated Tasks (10% of contract)	N/A	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
19	UNEVALUATED CONTRACT COST SUBTOTAL		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
20	TOTAL CONTRACT COST		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Proposal Evaluation, Negotiation, BAFO, Award (RFP 9)



Proposal Evaluation, Negotiation, BAFO, Award

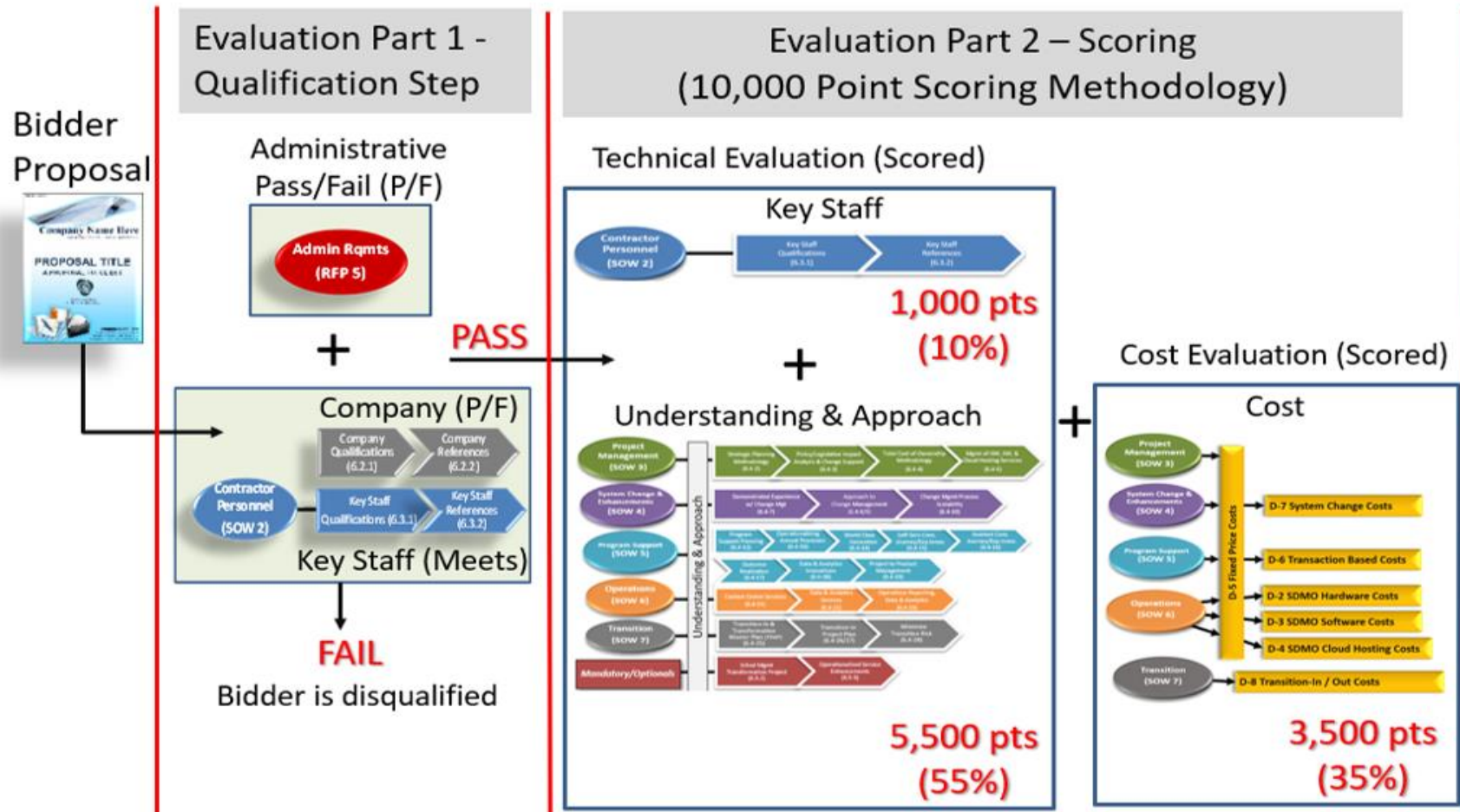
RFP Section 9 - Evaluation

9	EVALUATION	Table of Contents
9.1	Evaluation Process	
9.2	Qualification Step (Pass / Fail).....	
9.2.1	Administrative Compliance	
9.2.2	Evaluation of Bidder Responses to Bidder (Company) Qualification Requirements.....	
9.2.3	Evaluation of Bidder (Company) Reference Forms	
9.2.4	Evaluation of Bidder Key Staff Requirements.....	
9.2.5	Evaluation of Bidder Key Staff Reference Requirement.....	
9.3	Technical Evaluation & Scoring (6,500 points)	
9.3.1	Key Staff Qualification Requirements (800 Points).....	
9.3.2	Bidder Key Staff References (200 Points).....	
9.3.3	Understanding and Approach Evaluation Scoring Criteria (5,500 points)	
9.4	Cost Evaluation & Scoring (3,500 points)	
9.4.1	Cost Assessment	
9.5	Application of Preferences & Incentives and Final Score Determination..	
9.5.1	Small Business (SB)	
9.5.2	Disabled Veterans Business Enterprise.....	
9.6	Negotiations.....	
9.6.1	Proceeding with Negotiations	
9.6.2	Negotiation Invitation.....	
9.6.3	Key Staff Interviews and Oral Presentations	
9.6.4	Best And Final Offer (BAFO) Submission & Evaluation	
9.6.5	Evaluation of BAFO Submission.....	
9.6.6	Selection	
9.6.7	Calculating the Winning Bidder.....	
9.6.8	Selecting the Proposed Awardee.....	
9.7	Notification of Award	

Proposal Evaluation, Negotiation, BAFO, Award

RFP Section 9 – Evaluation (cont.)

Evaluation Approach



Proposal Evaluation, Negotiation, BAFO, Award

RFP Section 9 – Evaluation (cont.)

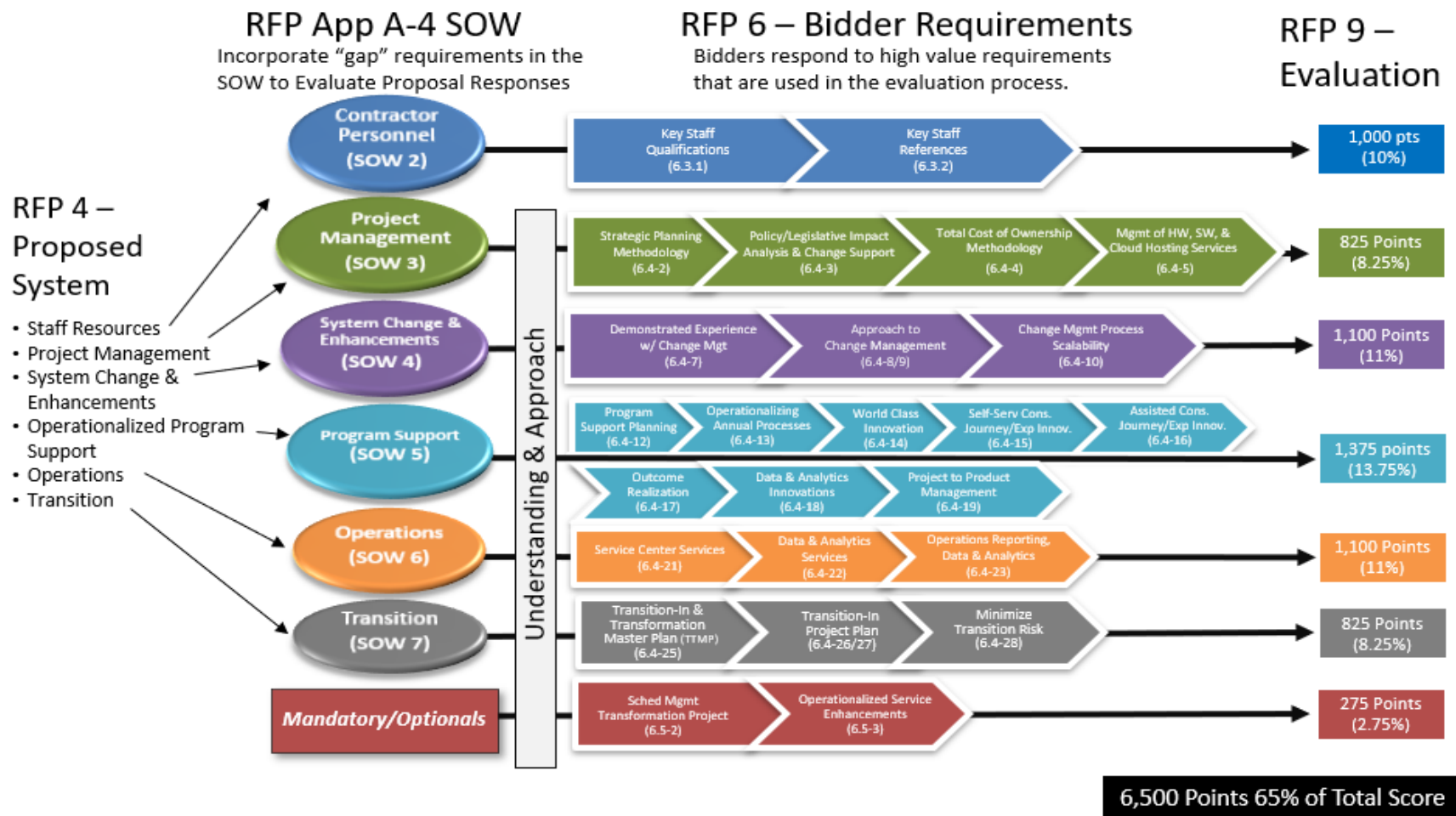
Evaluation Part 1 - Qualification Step



Proposal Evaluation, Negotiation, BAFO, Award

RFP Section 9 – Evaluation (cont.)

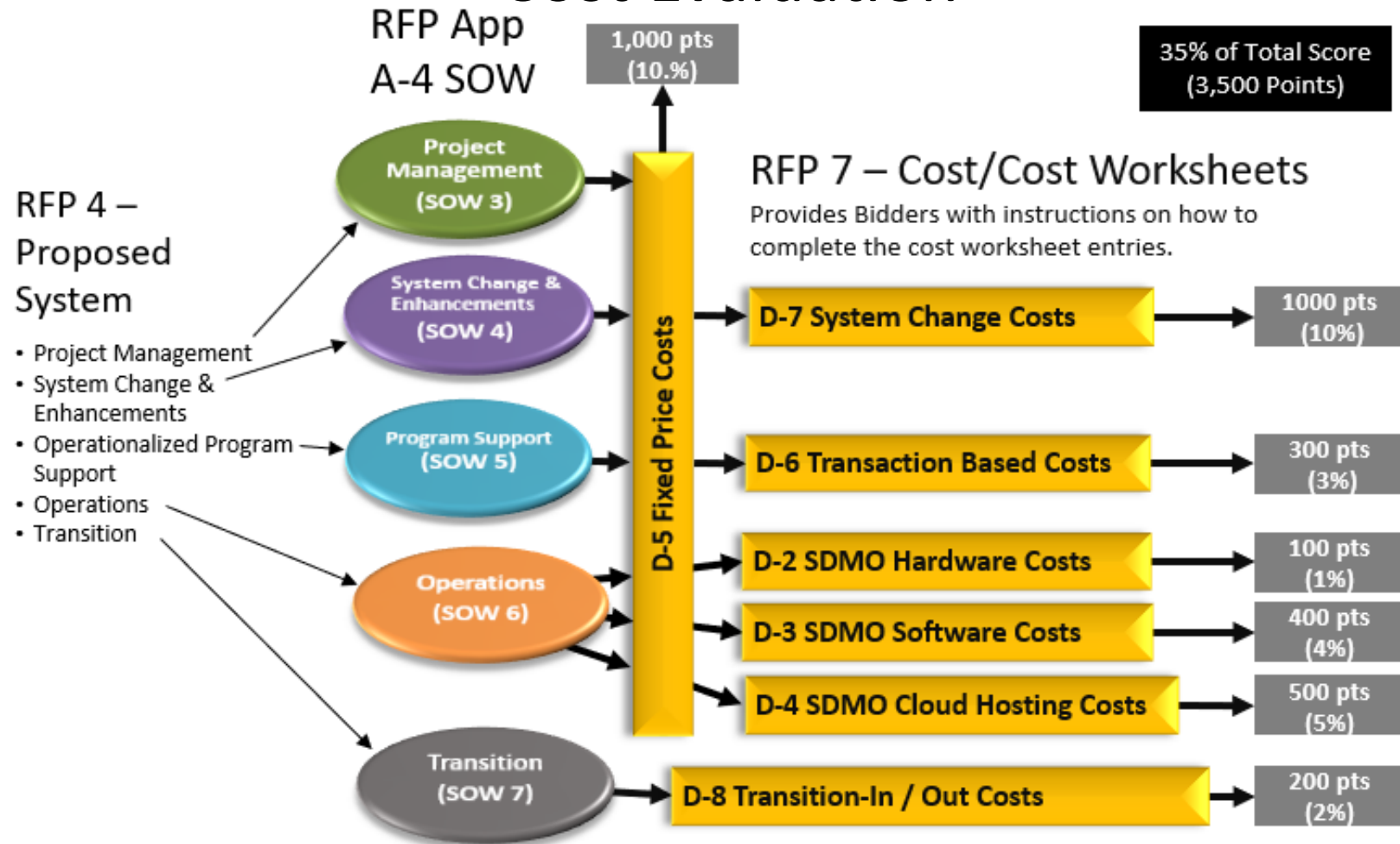
Evaluation Part 2 - Technical Evaluation (Scored)



Proposal Evaluation, Negotiation, BAFO, Award

RFP Section 9 – Evaluation (cont.)

Cost Evaluation



Provisions

RFP A-1 General Provisions
RFP A-2 Special Provisions
RFP A-3 Federal Provisions



Provisions

RFP Appendix A-2 – Special Provisions / SLAs

Special Provisions TOC

1	DEFINITIONS
2	CONTRACT AND SPECIAL PROVISIONS.....
3	SCOPE OF WORK.....
4	TERM
5	FINANCIAL MATTERS
6	PROJECT MANAGEMENT AND SCOPE
7	DELIVERABLES AND SERVICES.....
8	EQUIPMENT, CLOUD SERVICES, AND SOFTWARE.....
9	OFFSHORE ACTIVITIES.....
10	WARRANTIES
11	ADDITIONAL RIGHTS AND REMEDIES
12	CHANGE REQUESTS
13	INSURANCE
14	STATE PROPERTY
15	CONFIDENTIAL INFORMATION
16	INDEMNIFICATIONS
17	ADDITIONAL RIGHTS OF TERMINATION.....
18	ADDITIONAL CALHEERS SDMO GENERAL PROVISIONS.....
	ATTACHMENT A-2.1 PRIVACY & SECURITY REQUIREMENTS.....
	ATTACHMENT A-2.2 OFFSHORE SECURITY, ACCESS & TECHNOLOGY REQUIREMENTS.....
	ATTACHMENT A-2.3 SERVICE LEVEL AGREEMENTS (SLA) & LIQUIDATED DAMAGES.....

A-2.3 Service Level Agreements (SLAs) & Liquidated Damages

ATTACHMENT A-2.3 SERVICE LEVEL AGREEMENTS (SLA) & LIQUIDATED DAMAGES	
A.	SLA- SYSTEM WEB PORTAL AVAILABILITY
B.	SLA- SYSTEM DAILY BATCH PRODUCTION JOBS COMPLETION
C.	SLA- ROOT CAUSE ANALYSIS SUBMISSION
D.	SLA- SYSTEM WEB PORTAL TRANSACTION TIME.....
E.	SLA- SECURITY INCIDENT NOTIFICATION.....
F.	SLA- SECURITY INCIDENT MITIGATION PLAN.....
G.	SLA- SECURITY INCIDENT MANAGEMENT REPORT
H.	SLA- TECHNOLOGY SIMULATION
I.	SLA- SYSTEM ONLINE EHIT TRANSACTION TIME.....
J.	SLA- SYSTEM BATCH EHIT TRANSACTION TIME.....
K.	SLA- PUBLICATIONS PRINT
L.	SLA- IMAGE AVAILABILITY
M.	SLA- FINANCIAL MANAGEMENT – CARRIER INVOICING.....
N.	SLA- SYSTEM DEFICIENCY
O.	SLA- N-1 COMPLIANCE
P.	SLA- DATA WAREHOUSE AVAILABILITY
Q.	SLA- DATA AVAILABILITY
R.	SLA- TECHNOLOGY RECOVERY
S.	SLA- SERVICE CENTER AVAILABILITY
T.	SLA- SEVICE CENTER CALL RECORDINGS

RFP A-4 Statement of Work (SOW)

RFP A-4 SOW 1 – Introduction & Organization
RFP A-4 SOW 2 – Contractor Personnel Requirements
RFP A-4 SOW 3 – Project Management Requirements
RFP A-4 SOW 4 – System Change & Enhancement Rqmts
RFP A-4 SOW 5 – Program Support Requirements
RFP A-4 SOW 6 – Operations Requirements
RFP A-4 SOW 7 – Transition Requirements
RFP A-4 SOW 8 – Deliverables
RFP A-4 Exhibit A – System Requirements Specification



RFP A-4 Statement of Work (SOW)

SOW Overview

CalHEERS System covers all things related to the technical solution, and includes the "System shall" requirements for the functions and architecture of the solution that is in production today.

Staffing covers the numbers and types of skills staff must possess in order to support the CalHEERS system.

Deliverables outlines the requirements for development, formatting, submission, acceptance/ approval of all Informal and Formal Deliverables in the SOW.

Transition consists of three (3) phases: Transition-In, Transformation, and Transition-Out, and the variety of overlapping activities between Contracts.

Operations covers all things related to supporting the day-to-day needs of the system and infrastructure supporting the system for things such as: planning, problem management, processes, reporting, interfaces, site/facilities, capacity, backup & recovery, data retention, environments, performance (including uptime) and HW/SW



Project Management covers all things related to managing the project such as: schedule, cost, HRM, Risk, Issues, communication, documentation, contract requirements, stakeholders, problem escalation, quality, subcontractors, PM Tools.

System Change & Enhancements covers all things related to system changes/enhancements that must be run through a formal change control process, for changes such as: System upgrades, tech refresh, code development, testing, defects, releases, strategic planning, & system requirements.

Program Support covers all things related to supporting the cyclic needs of the program including data driven table updates, Website performance and tuning, user manual, forms support, reporting & metrics, response to legal requests and legislative impact analysis.

RFP A-4 Statement of Work (SOW)

SOW Requirement # Designators

Req #	SOW Requirement
3.1.2-01 (new)	The Contractor shall staff, CalHEERS as defined in the Project Management Plan
3.1.2-02 (new)	The Contractor shall collate Artifacts necessary to support Artifacts Repository and maintain
3.1.2-03 (existing)	Upon Contract award, the project management plans
3.1.2-04 (modified)	The Contractor Project Management Technology & Solutions Implement best practices for the development

- **(existing)** = Work performed on the Contract today that the State requires under the next Contract.
- **(modified)** = Work performed on the Contract today that the State requires improvements to under the next Contract.
- **(new)** = Work that is currently not performed on the Contract today that the State requires under the next Contract.

The designators for SOW requirements are valuable to help Bidders' to better understand the body of work and the degree of how requirements have changed from the prior to the new SOW.

Bidders' Library Content, Access & Submitting Questions



Bidders' Library Content, Access & Submitting Questions

Accessing the Bidders Library

- Access to the Bidder Resources Site
 - Procurement Official must receive a completed and signed:
 - Appendix B-4, CONFIDENTIALITY STATEMENT FORM
 - Appendix B-5, ACCESS AUTHORIZATION FORM
 - One (1) login will be provided per company (via email) to the single point of contact, including a User ID, Password, Link, and a copy of the Bidder Resources Guide.

Bidder Library

Bidder Library Home + New Page details Preview Analytics Published 10/3/2025

Question or RFC List

Recycle bin

Edit

Bidder Resources - CalHEERS RFP #73040873

This site provides the opportunity to submit Questions or Requests for Change and provides access to the Bidders' Library #73040873.

[Bidder Resources Guide \(10/3/2025\)](#) - Review these basic instructions for the functions available on this site.

Questions or Requests for Change

Bidders may submit Questions and/or Requests for Change using the button below.

[Submit a Question or Request for ...](#)

LINKS to Document Views: [Alphabetical](#) | [SOW](#) | [Change Summary](#)

Bidders' Library Content, Access & Submitting Question Submitting Bidder Inquiries

Bidders may submit Questions and/or Requests

[Submit a Question or Request for ...](#)

This site provides the opportunity to submit
#73040873.
[Bidder Resources Guide \(10/3/2025\)](#) - Review

**BIDDER RESOURCES
GUIDE**
Request for Proposal #73040873
October 3, 2025

Contents

Introduction	3
Instructions to Access CalHEERS Bidder Resources	3
Submitting Questions, Requests for Change, Requests for Artifacts	5
Navigating the Bidders' Library	6
Sorting Bidders' Library Items	8
File Types in the Bidders' Library	9
Opening and Saving Documents from the Bidders' Library	9

CalHEERS Bidder Resources Guide, 2025.docx

New Item

Date Submitted *

10/13/2025

Vendor Name *

Enter value here

Submit a Question, Proposed Change, or Artifact Request *

Enter value here

Rationale *

Enter value here

RFP Location (e.g. RFP Section, Pg#, Rqmt#) *

Enter value here

Please provide as much information in this field so that our team can easily locate the correct information in the RFP.

[Save](#) [Cancel](#)

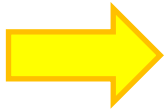
Bidders' Library Content, Access & Submitting Questions

Submitting Bidder Inquiries (cont.)

- Bidders can review the list of ***their*** submitted items.
 - Do not edit or delete submitted items.
 - Only the submitting Bidder (& Procurement Team) can see entries.
- State responses to Bidder inquiries will typically fall into one of the following categories (we will make that determination):
 - Questions & Answers (Q&As)
 - Request for Changes (RFC)
 - Request for Artifacts (RFA)
- Submit confidential questions to the Procurement Official
- The State will respond to all inquiries and publish them to Cal eProcure.

Bidders' Library Content, Access & Submitting Questions

Navigating the Bidders Library



LINKS to Document Views: [Alphabetical](#) | [SOW](#) | [Change Summary](#)

- **Alphabetical Views**
 - Orders Library artifacts by the artifact title
 - Useful if you are looking for something by name
- **SOW Views**
 - Orders Library artifacts by SOW section in numerical order
 - Presents like-artifacts by SOW section grouped together
- **Change Summary Views**
 - Orders Library artifacts that have been added or changed since the opening of the Library (grouped by date posted)
 - Useful to see the most recent changes in library artifacts

Bidders' Library Content, Access & Submitting Questions

Types of Artifacts in the Bidder Library

Artifact is the term used to describe ALL documentation available to Bidders.



There are a variety of Artifact Types:

SI Deliverables
(identified with a "D" designation)

SI Work Products
(identified with a "W" designation)

State Work Products
(identified with a "S" designation)

Reference Documents
(identified with a "R" designation).

D- Deliverables are documentation specifically called out in SOW 8 – Deliverables where the SI goes through a specific review and approval process.

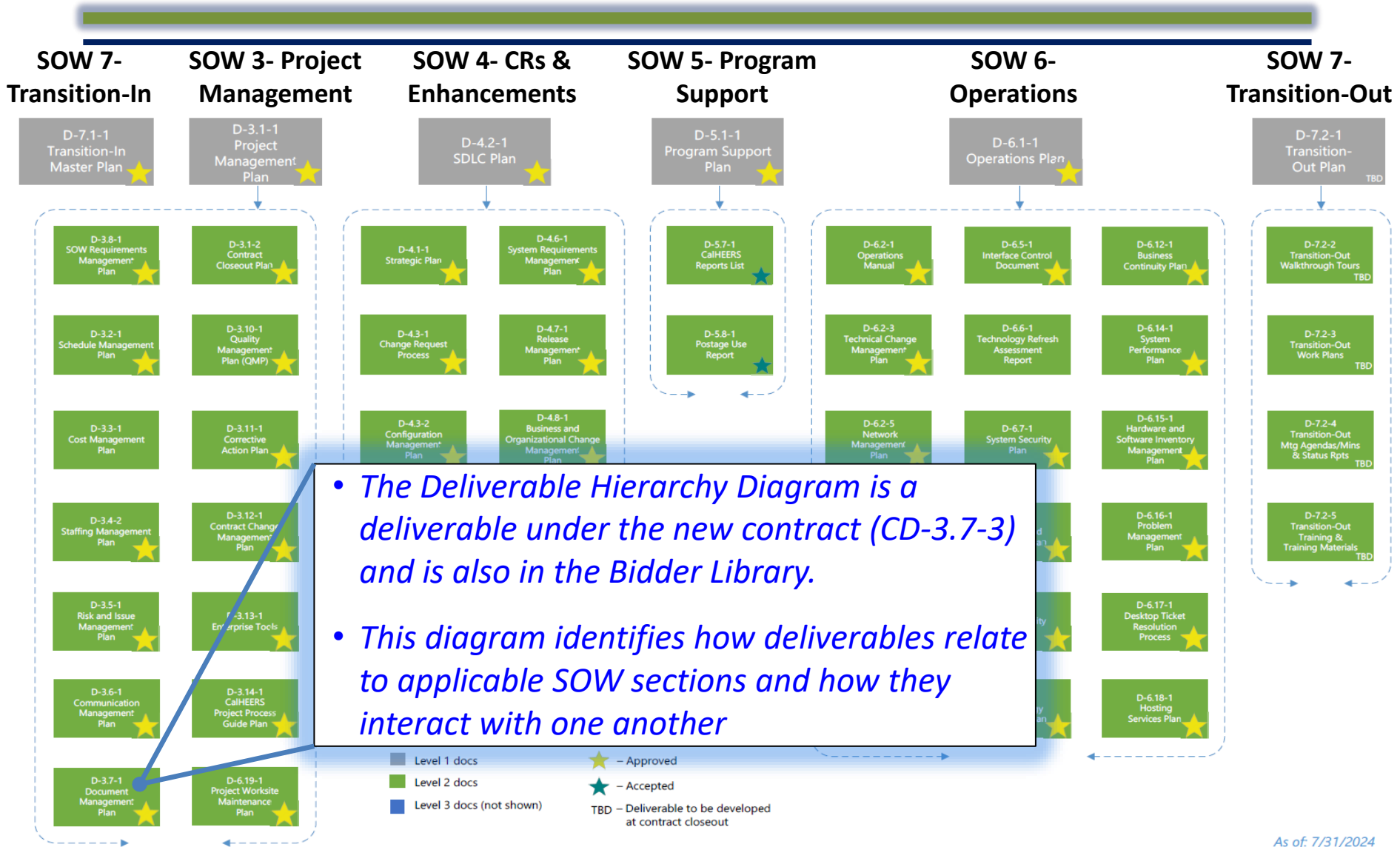
W- Work Products are also documentation called out in the contract. However, these work products are not specifically called out in SOW 8, as they are processes through an informal review and approval process.

S- State Work Products are not generated by the SI. Instead, these are State-produced and managed artifacts that are necessary for the SI to have access to.

R- Reference Documents are informational artifacts used exclusively for the Bidder Library to guide and assist Bidders in preparation of their proposals.

Bidders' Library Content, Access & Submitting Questions

Deliverable Hierarchy Diagram (CD-3.7-3)



As of: 7/31/2024

SOW 3- Project Management

Bidders' Library Content, Access & Submitting Questions

Deliverable Hierarchy Diagram

Example





Part 3 – CalHEERS and Governance Structure

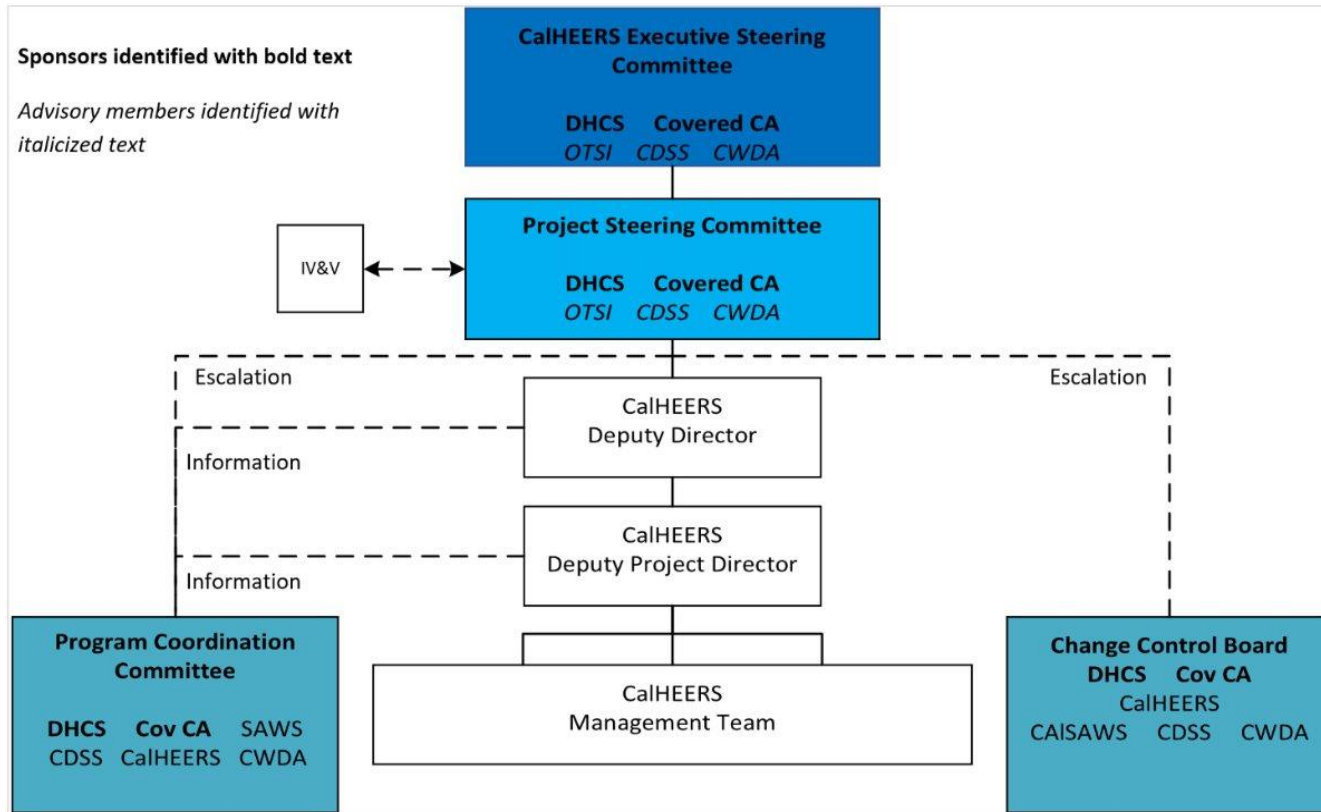


CalHEERS Governance



CalHEERS and Governance Structure

CalHEERS Governance

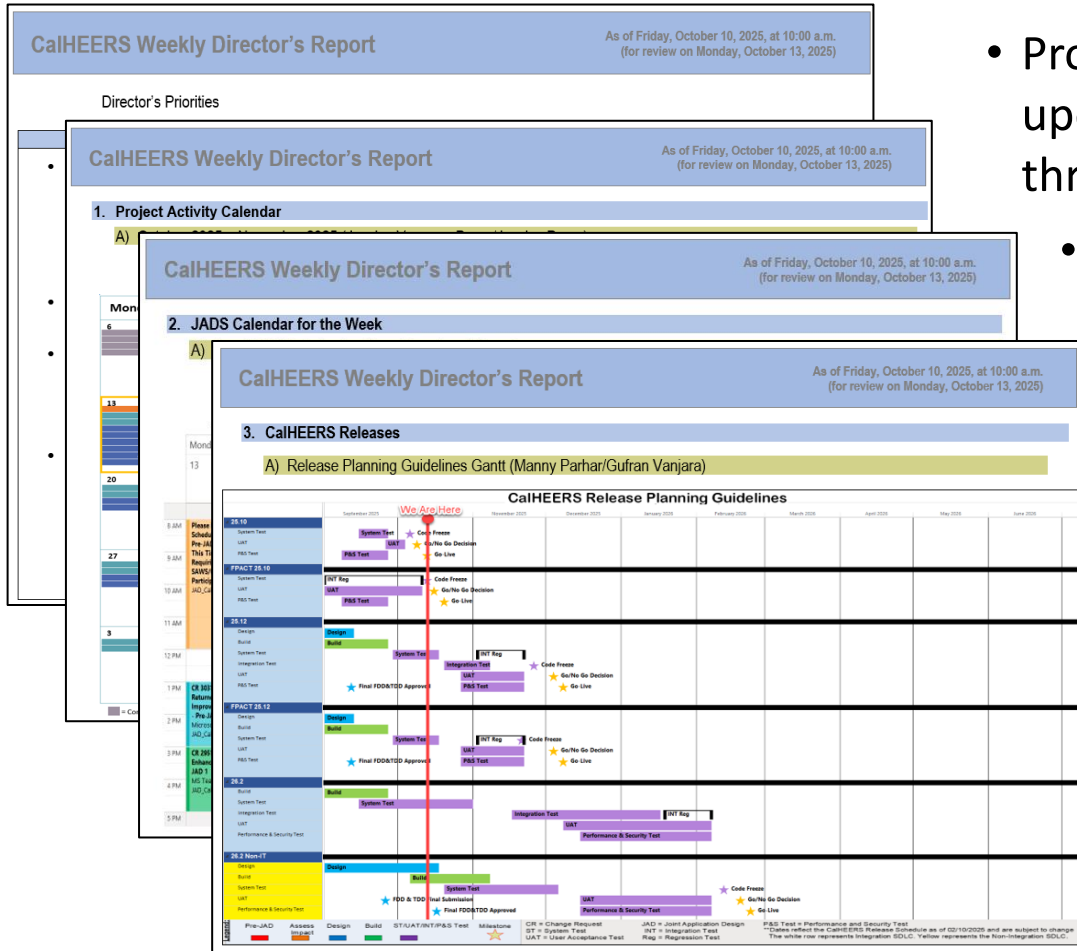


- The Executive level establishes and reinforces the vision for the programs and provides the highest-level program direction (i.e., Where CalHEERS aspires to be).
- The Project Steering Committee helps set program direction and defines the program's goals, objectives, and business priorities (i.e., What CalHEERS needs to do).
- The Program Coordination Committee helps to determine business approaches to achieve the goals, objectives, and business priorities defined by the Project Executives and Project Steering Committee (i.e., How the programs execute).

- *This image is part of the State's Governance Plan and is in the Bidders' Library*
- *The Governance Plan is referenced in the Project Management Plan Del*

CalHEERS and Governance Structure

CalHEERS Weekly Director's Report



- Provides a weekly glimpse of upcoming activities happening throughout the week.
- Keeps all stakeholder teams up-to-date on upcoming events.
- Identifies work in progress activities and decision and actions required.
- Focuses attention on areas needing special attention.

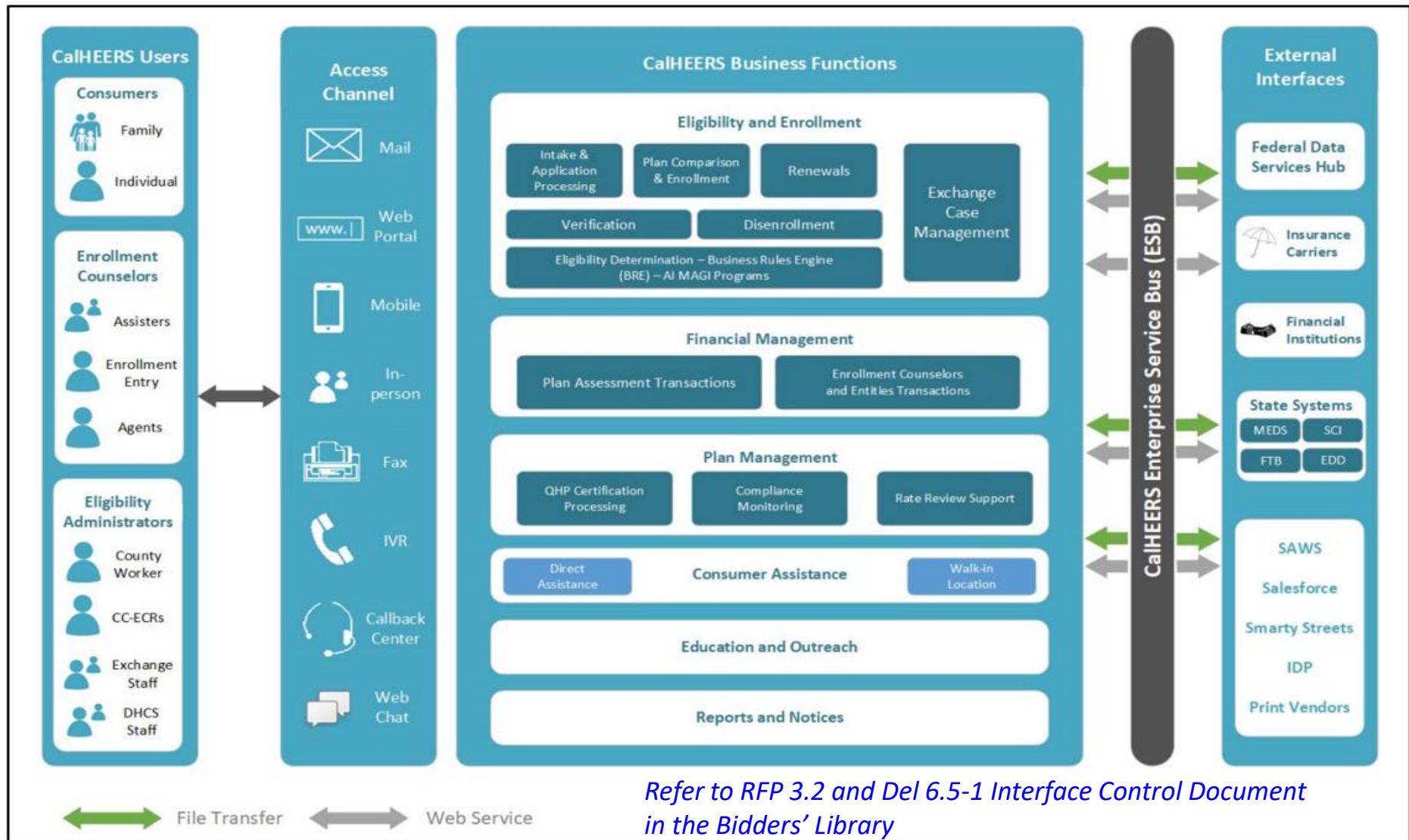
The CalHEERS Weekly Director Report available in the Bidder's Library.

Functional & Technical Overview



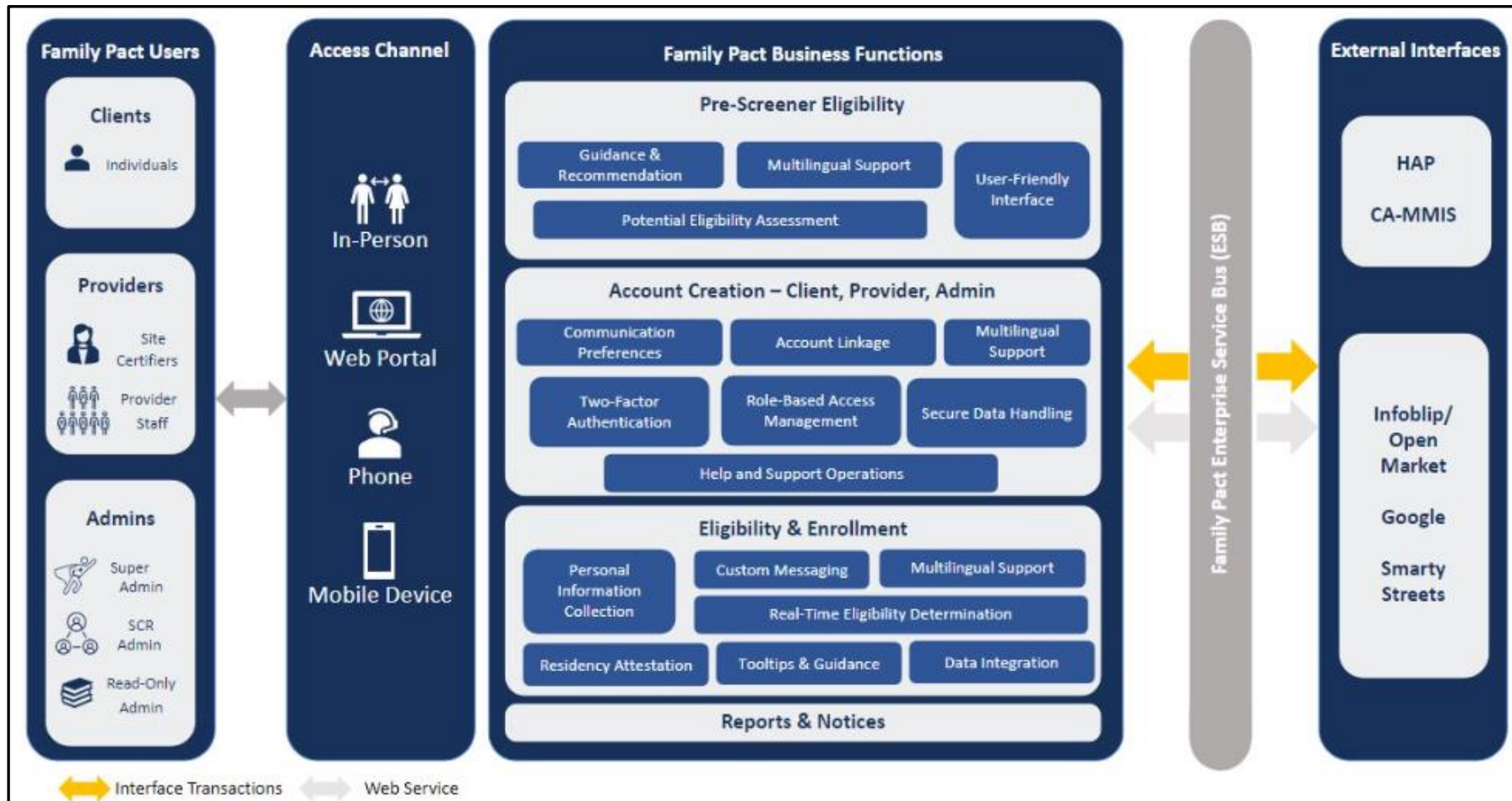
CalHEERS and Governance Structure

CalHEERS Functional Overview



CalHEERS and Governance Structure

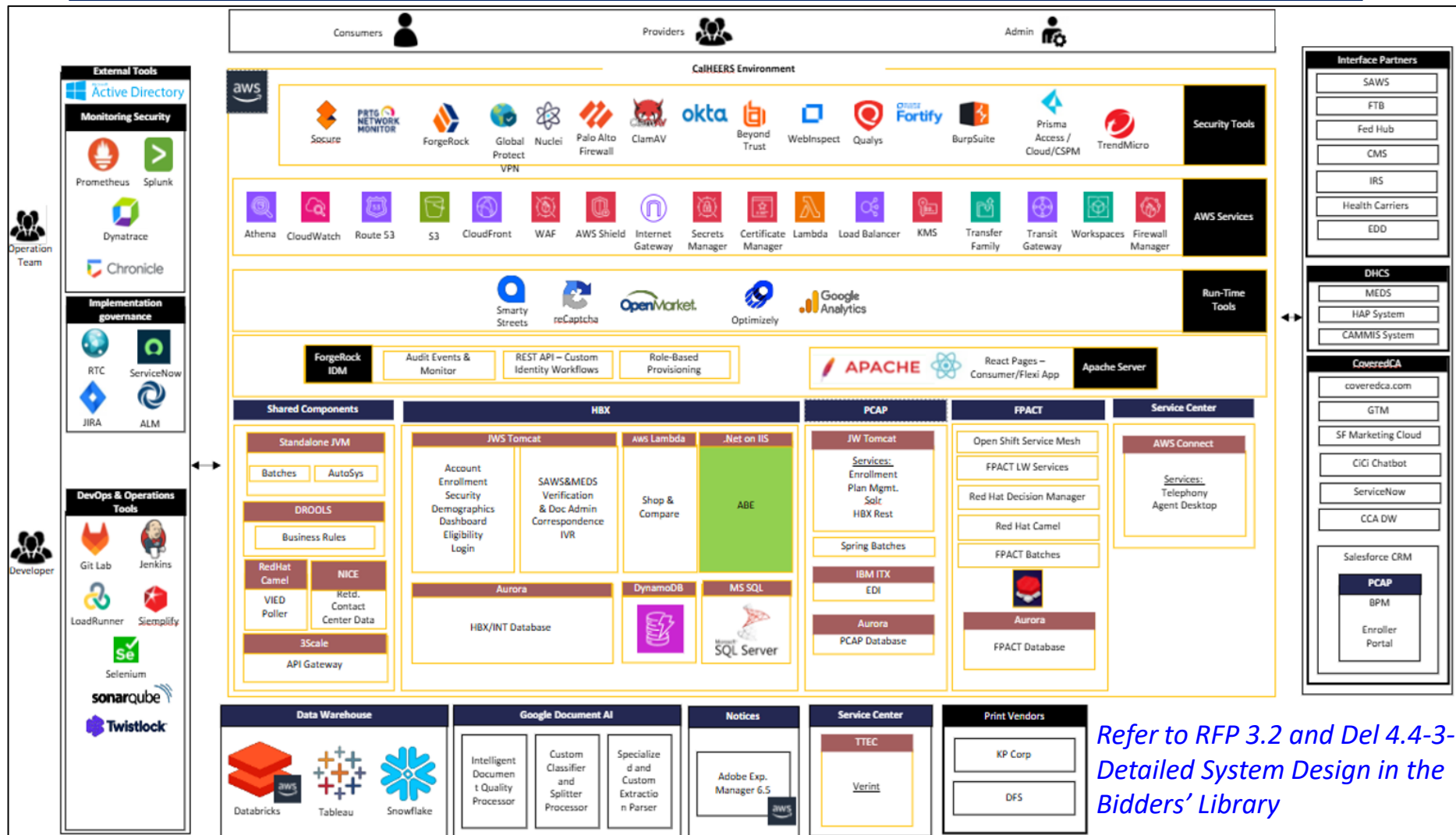
CalHEERS Functional Overview (cont.)



Refer to RFP 3.2 and Del 6.5-1 Interface Control Document in the Bidders' Library

CalHEERS and Governance Structure

Current – Technical Ecosystem



Refer to RFP 3.2 and Del 4.4-3-Detailed System Design in the Bidders' Library

SDLC Methodologies & Release Cycles



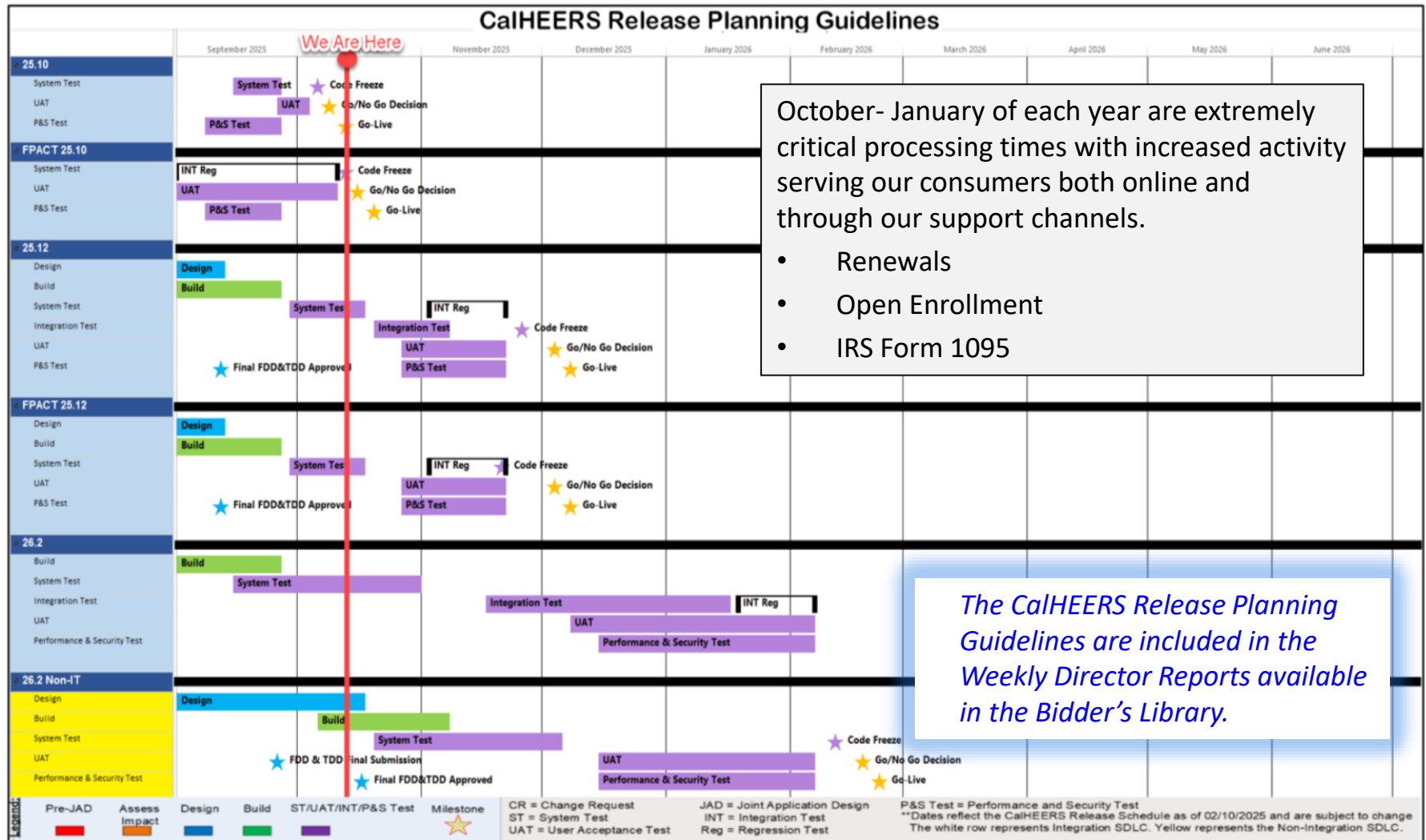
SDLC Methodologies & Release Cycles

CalHEERS SDLC Methodologies

- CalHEERS uses a variety of different methodologies to implement the SDLC.
 - Waterfall SDLC
 - Agile Development methodology
 - Multiple iterative methodologies focused on the “Consumer in the Center”
 - Human Centered Design (HCD)
 - Nudging
 - Choice Architecture
- The SI assists the State in choosing the appropriate methodology for the need.

SDLC Methodologies & Release Cycles (cont.)

CalHEERS Feature Release Planning



Part 4 – Question & Answer / Wrap-Up



BREAK & Submission of Questions



Response to Submitted Questions



What's Next



Next Steps

- Reminders for the RFP:
 - RFP is located on Cal eProcure→
<https://caleprocure.ca.gov/event/0531/0000036719>
 - The State is currently working on Addendum 1.
 - Pay attention to Key Action Dates.
 - Submit questions via Bidder Resources site→
https://osicagov.sharepoint.com/sites/CalHEERS-SDMO/SDMO_Procurement/Bidder_Library/
- Additional Questions: CalHEERSprocurement@otsi.ca.gov
- Look to Cal eProcure for the following:
 - This presentation will be posted.
 - Today's comments/inquiries will be responded to via Cal eProcure.
 - Future communications and information about this solicitation.

Thank You For Attending