

COVER PAGE



Request For Proposal (RFP)

RFP 26-014-280

PART 1 – BIDDER INSTRUCTIONS

FOR

Water Technical Access Portal (WaterTAP)

October 2, 2026

Issued by:

STATE OF CALIFORNIA

Department of Technology

10860 Gold Center Drive, Rancho Cordova, CA 95670

In conjunction with

California State Water Resources Control Board (SWRCB)

P.O. Box 100, Sacramento, CA 95812-0100

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 and responsible to the solicitation.

Part 2 of the solicitation contains all forms a Bidder must complete and return with its Phase 1 and Phase 2 proposals, 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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PART 1 - BIDDER INSTRUCTIONS

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PART 1 – BIDDER INSTRUCTIONS

1. INTRODUCTION

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

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

The following terms are used interchangeably throughout the solicitation documents: (1) "Contract" and "Agreement"; (2) "response" and "proposal".

1.1. PURPOSE

The purpose of this Request For Proposal (hereinafter referred to as "solicitation" or "RFP") is to obtain proposals from qualified bidders to provide the California State Water Resources Control Board (SWRCB) and the State of California (hereinafter referred to as the "State" or "SWRCB") with IT Consulting Services and Software (hereinafter referred to as "WaterTAP" or "the Solution"). These services will include implementation of the WaterTAP solution, software licensing and maintenance, and optional post-implementation services.

This solicitation follows a phased approach that includes multiple submissions and evaluations to determine the most qualified Bidder to design, develop, and implement the WaterTAP software licensing and maintenance, and optional post-implementation services. WaterTAP, as a proposed enterprise-level data system, is needed to address current and future information needs. An overarching architecture is critical to connect existing foundational data systems, including but not limited to SDWIS, WQIR/CLIP, eAR, and the SAFER Clearinghouse, as well as integrating new data systems from the disparate spreadsheets and databases currently used in DDW Districts into a single, cohesive system to streamline information access.

SWRCB seeks to implement a cloud-based Software as a Service (SaaS) solution that WaterTAP will fully support. WaterTAP must support a secure system to intake documentation, certifications, compliance forms, and data from public water systems; determine compliance; support staff and management through compliance evaluations, document generation, and recordkeeping; facilitate data-driven decision-making; and provide automated data publication.

Evaluation of responses to this solicitation will be based on each Bidder's responsiveness to the solicitation requirements and its ability to provide a value-effective solution. The Contract Award, if made, will be to a single Bidder awarded the highest points as calculated in accordance with the methodology defined in [SECTION 6. EVALUATION](#).

1.2. BACKGROUND

The SWRCB's mission is to preserve, enhance, and restore the quality of California's water resources and drinking water for the protection of the environment, public health, and all beneficial uses, and to ensure proper water resource allocation and efficient use, for the benefit of present and future generations. To this end, the SWRCB develops statewide permits, policies, and regulations to protect water quality, regulates drinking water, administers California's water rights system, and supports Regional Water Quality Control Board efforts. In addition, the SWRCB provides financial assistance in the form of grants and loans for projects that clean up and protect water quality and drinking water supplies, and that protect water resources. The State Water Resources Control Board works to advance several foundational values, including climate change resilience, environmental justice, and racial equity.

The Division of Drinking Water (DDW) has historically maintained several disparate tools and databases to help facilitate regulatory oversight. However, these tools are inadequate to streamline data intake, improve data quality, manage workflows, and ensure transparency of information as required. A new data management solution is needed to ensure ongoing, up-to-date compliance evaluations of the large number of public water systems in California.

A secure system is needed to intake documentation, certifications, compliance forms, and data from public water systems; determine compliance; support staff and management through compliance evaluations, document generation, and recordkeeping; facilitate data-driven decision-making; and provide automated data publication. DDW does not currently have a system that would allow public water systems to upload the required information for review and approval.

1.3. CURRENT AND PROPOSED ENVIRONMENTS

1.3.1. CURRENT ENVIRONMENT

Please see EXHIBIT A: STATEMENT OF WORK for a description of the current environment.

1.3.2. PROPOSED ENVIRONMENT

This section is intended to present an overview of the proposed solution, and as such, will not specify any detailed technical requirements. A more detailed description of the proposed environment and overall project requirements for the WaterTAP solution are included in EXHIBIT A: STATEMENT OF WORK. The solution requirements supporting this overview are included in EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

SWRCB is seeking to replace legacy systems with a configurable, cloud-based Software as a Service (SaaS) solution that will be an enterprise-level data system which aims to minimize customization and:

- Address current and future information and business needs,
- Maintain an overarching architecture to connect existing foundational data systems,
- Integrate new data systems from disparate spreadsheets to databases currently used, into a single, cohesive system,
- Streamline information access for internal staff and external stakeholders,
- Supports data and document submissions, workflow routing, and compliance decision support

The SWRCB applications are currently within the proposed solution's scope; please refer to EXHIBIT H: DATA CONNECTIONS.

The Contractor will identify all required software licenses on Software Licensing Program (SLP) including SLP Contract Number and License SKUs for all SaaS licensing and related software and tools needed for development, implementation, data migration, ongoing access, support and hosting of WaterTAP to meet the EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS to support the following users of WaterTAP:

- SWRCB estimates a total of ~65,000 total active users who will need to be able to log in and report.
- SWRCB estimates a total of ~7,200* Water System Administrators will need to be able to log in at the launch of WaterTAP, associate other users' accounts with their Public Water System (PWS)(s), submit/modify documents and data, and attest to submissions that are created either by them or other users associated with their PWS(s).
- SWRCB estimates a total of ~35,000* external user accounts that will need to be able to log in

within the first eighteen (18) months of the launch of WaterTAP, associate their profile with one or multiple PWS's, and prepare submissions.

- SWRCB estimates a total of ~550* internal users that need to be able to log in and save progress at the launch of WaterTAP to the staff part of WaterTAP.
- SWRCB estimates a total of ~300* internal users who need to be able to log in with read-only permissions within 12 months of the launch of WaterTAP.
- SWRCB estimates a total of ~20* System Administrators who will need to be able to manage and administer WaterTAP and its associated functionality (e.g., configurations, workflows, etc.).
- SWRCB estimates a total of ~400* users (Labs) to submit requests via WaterTAP for routing and response.

*NOTE: This number is included in the total user count described above.

The WaterTAP cloud-based SaaS solution will enable SWRCB to be more agile in responding to new legislation and to support California's environmental requirements. It will also create a streamlined user experience, increase efficiency, and create a single system of record for all drinking water reporting. Finally, the WaterTAP cloud-based SaaS solution will also improve access to data for more robust and complete reporting.

1.4. TERM OF CONTRACT

Effective upon approval of the California Department of Technology (CDT), Office of Statewide Technology Procurement (OSTP), and SWRCB, the base term of this Contract shall consist of three (3) years. During the first twenty-one (21) months of the base term, the Design, Development, and Implementation (DD&I) must be completed. Upon completion of system implementation, a three-month (3-month) system stabilization and full system acceptance period shall occur. Following system acceptance, the remaining twelve (12) months of the base term shall consist of Maintenance and Operations (M&O) services, which shall run concurrently with the system warranty period.

The State, at its sole discretion, may exercise its option to execute a one-year (1-year) extension for time-related work, to include implementation and full system acceptance. This time-only extension would be at the originally agreed-upon deliverable rates specified in this Contract and at no additional cost to the total Contract.

The State, at its sole discretion, may exercise its option to execute up to two (2) additional one-year (1-year) optional extensions to perform Maintenance and Operations (M&O) services for a maximum Contract term of six (6) years.

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

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

This Contract may be terminated in accordance with the provisions of the Information Technology General Provisions Cloud Computing Services DGS PD 402-ITGP Cloud (Revised and Effective 02/20/2025) - State of California. Notwithstanding any provision in this Contract, if the Contract is terminated by State for convenience of the State, the termination can be made at the sole and exclusive discretion of the State for any or no reason.

1.5. WORK LOCATION, REMOTE ACCESS, AND WORK HOURS

If a Contract is awarded, all tasks associated with this Contract shall be performed remotely or onsite within the hours specified and detailed in EXHIBIT A: STATEMENT OF WORK.

1.6. 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 an 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 1-1: The California Relay Service Telephone Numbers are:

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 a phased approach designed to increase the likelihood of a successful proposal and the Bidder's eligibility for invitation to negotiation.

The Bidder should refer to [SECTION 2.5. BIDDING STEPS](#) to review and understand the details surrounding the phases of this solicitation and [SECTION 6. EVALUATION](#) to understand the evaluation process for each element of the proposal for each phase. It is the Bidder's responsibility to:

1. Carefully read the entire solicitation.
2. Submit questions in a timely manner using ATTACHMENT 1: TEMPLATE FOR QUESTION SUBMITTAL/REQUEST FOR CHANGES.
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. Following Phase 1 Proposal submission, Bidder communications may be sent directly to Phase 2 Bidders via email.

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

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 2-1: Procurement Officers

DESCRIPTION	CONTACT INFORMATION
Department Name:	California Department of Technology, Office of Statewide Technology Procurement (OSTP)
Procurement Officer:	Nichole Gutierrez
Email:	nichole.gutierrez@state.ca.gov
Phone:	(279) 216-0606
Secondary Procurement Officer:	Kerry Jones
Email:	kerry.jones@state.ca.gov
Phone:	(916) 460-9803

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 Officer and Secondary Procurement Officer 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 Officer by the date specified in [SECTION 2.3. KEY ACTION DATES](#).

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

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. Following Phase 1 evaluations, responses to Bidder questions may be sent directly to Bidders via email. 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 must 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](#). Bidders who submit a completed ATTACHMENT 2: INTENT TO BID FORM acknowledging interest in this solicitation will receive correspondence applicable to the solicitation (e.g., dates for confidential discussions, meetings, etc.) throughout this procurement. Correspondence to a Bidder regarding this solicitation will only be provided to the Bidder's designated contact(s) on ATTACHMENT 2: INTENT TO BID FORM.

It shall be the Bidder's responsibility to notify the Procurement Officer in writing, regarding any change to its Intent to Bid or the designated contact(s) 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 Bidder's designated contact person(s).

Submission of an Intent to Bid does not obligate a Bidder to submit a Proposal for this solicitation. An Intent to Bid may be withdrawn at any time prior to the Proposal submission due date for any reason if the Vendor no longer wishes to proceed. Withdrawal from the procurement process following submission of a Proposal is detailed in [SECTION 2.5.4. WITHDRAWAL AND RESUBMISSION/MODIFICATION OF PROPOSALS](#).

The Bidder must submit a completed ATTACHMENT 2: INTENT TO BID FORM and ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM to obtain access to the Bidders' Library.

2.2.4. BIDDERS' LIBRARY

Throughout the solicitation, the State will make available a Bidders' Library containing reference and supporting documentation that Bidders may review and use to prepare their proposals. Bidders are encouraged to review the information in the Bidders' Library to gain a thorough understanding of WaterTAP. It is each Bidder's responsibility to check frequently for updates to the Bidders' Library.

The State will upload documents to the Bidders' Library as they become 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.

To obtain access to the Bidders' Library, Bidders must sign and electronically submit ATTACHMENT 2: INTENT TO BID FORM and ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM to the Procurement Officer. The Bidder's representative(s) identified on ATTACHMENT 2: INTENT TO BID FORM will be provided access to the Bidders' Library. Upon request by the Bidder, access information will be provided to the Bidder's representative(s) within three (3) working days of receipt of ATTACHMENT 2: INTENT TO BID FORM and ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM.

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

It is the Bidder's responsibility to contact the Procurement Officer for a user ID, password and URL to gain access to the Bidders' Library.

Bidders are encouraged to review the information in the Bidders' Library to gain a thorough understanding of WaterTAP project requirements. The Bidders' library will include a number of programs and technical artifacts for reference, in addition to the primary Request for Proposal, Attachments, and Exhibits.

Example content includes:

- Workflow Diagrams
- Data Element Dictionary Examples
- Drinking Water Regulations
- Sample Data
- Technical Diagrams

All data stored in WaterTAP or provided by the State shall be considered private and shall not be submitted to any processes for analysis, including artificial intelligence (AI), for the purposes of research and data mining.

2.2.5. CONFIDENTIALITY STATEMENT

Bidders that wish to participate in the solicitation must submit a completed ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM by the date specified in [SECTION 2.3. KEY ACTION DATES](#).

ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM shall be submitted by email to the Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#). Bidders participating in this solicitation, which may require contact with confidential, State information or State customer information, must agree to the State's confidentiality requirements and 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 is designated confidential by the State.

If a Contract is awarded, a signed Confidentiality Statement will be required from each of the Contractor's personnel, agents, and subcontractors assigned to the Contract.

The Bidder must submit a completed ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM and [SECTION 2.2.3. INTENT TO BID](#) to obtain access to the Bidders' Library.

2.2.6. CLOUD COMPUTING SERVICES

Per the State's Cloud Computing Policy, Agencies/State entities must first consider CDT Managed Cloud Services or CDT-approved cloud service offerings. These service options provided by CDT 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 9.4. STATE HOSTED ENVIRONMENT](#) for specific hosting requirements for this solicitation.

2.3. KEY ACTION DATES

Key Action Dates (KADs) are dates and times by which actions must be taken or completed for this procurement. If the State finds it necessary to change any of the listed dates or times, an addendum to this solicitation will be released, except the dates listed after the Bidder's submission of the Phase 2 Proposal. All times listed are Pacific Time (PT).

Table 2-2: Key Action Dates (KAD)

KEY ACTION DATES		
ITEM	ACTION	DATE AND TIME
Phase 1		
1.	Release of Solicitation	October 2, 2026

2.	Last Day to Submit Written Questions Regarding Original Solicitation (Q&A Set 1)	October 22, 2026, 12:00 PM PT
3.	State's Response to Bidder Questions Regarding Original Solicitation (Q&A Set 1), and Possible Release of Addendum 1	November 9, 2026
4.	Last Date to Submit eVAQ Application	November 9, 2026
5.	Last Day to Submit Intent to Bid and Confidentiality Statement for Access to Bidders' Library	November 17 , 2026, 12:00 PM PT
6.	Last Day to Request Access to the State's File-Sharing Site	November 24, 2026, 12:00 PM PT
7.	Last Day to Obtain eVAQ Approval and Submit Phase 1 Responses Due	December 2, 2026, 12:00 PM PT
*8.	State's Evaluation of Phase 1 Responses	December 3, 2026 – December 18, 2026
*9.	Notification of Bidders to Proceed to Phase 2	December 22, 2026
Phase 2		
*10.	Last Day to Submit Written Questions Regarding Phase 2	January 5, 2027, 12:00 M PT
*11.	State's Response to Bidder Questions Regarding Phase 2 (Q&A Set 2) and Release of Addendum 2 (if needed)	January 12, 2027

*12.	Last day to Submit Phase 2 Responses	January 28, 2027, 12:00 PM PT
*13.	State's Evaluation of Phase 2 Responses	January 29, 2027 – February 25, 2027
*14.	State's Evaluation of Cost	February 26, 2027
*15.	Release Notification of Invitation to Negotiate	March 2, 2027
Phase 3		
*16.	Negotiations	March 8, 2027 - March 29, 2027
*17.	Last Day to Submit Best and Final Offer (BAFO)	April 12, 2027
*18.	State's Evaluation of BAFO Submission	April 13, 2027 - April 20, 2027
*19.	Issue Notification of Award	May 20, 2027

*20.	Contract Execution	May 20, 2027
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Note: Items with an asterisk (*) specify an estimated date and time and may be adjusted without issuance of an addendum to this solicitation.

2.4. RULES GOVERNING COMPETITION

This solicitation, the evaluation of responses, and the award of any resultant Contract shall be made in conformance with current competitive bidding procedures set forth in Public Contract Code (PCC) 6611 and 12100 as they relate to the procurement of IT goods and services or telecommunications by public bodies in the State of California.

2.4.1. IDENTIFICATION AND CLASSIFICATION OF SOLICITATION REQUIREMENTS

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

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

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

2.4.2. SOLICITATION DOCUMENTS

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

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

document.

Modifications will be made by addenda issued pursuant to [SECTION 2.4.6. ADDENDA](#).

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 submission date 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.

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 telecommunications, information technology (IT) goods or services or assisting in the preparation of the Project Approval Lifecycle (PAL) documents (stages 2, 3, or 4), while in effect, if that consultant is to be a source of such acquisition or could otherwise directly and/or materially benefit from State adoption of such recommendations or the course of action recommended in the PAL documents (stages 2, 3, or 4). Further, no consultant shall be paid out of State funds for developing recommendations on the disposal of State surplus IT goods if that consultant would directly and/or materially benefit from State adoption of such recommendations.

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

The Bidder must complete and submit ATTACHMENT 3: FOLLOW-ON DISCLOSURE FORM with its Phase 1 Proposal.

2.4.5. CONFIDENTIALITY

Bidder material becomes public only after the Notification of Award is released. If material marked "confidential," "proprietary," or "trade secret" is requested pursuant to the Public Records Act, the State will

make an independent assessment of whether it is exempt from disclosure. If the State disagrees with the Bidder, the State will notify the Bidder and give them a reasonable opportunity to justify their position or obtain a court order protecting the material from disclosure.

The Bidder should be aware that marking a document “confidential” or “proprietary” in 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 overemphasized.

2.4.6. ADDENDA

The State may modify the solicitation at any time prior to submission of proposals by issuing an addendum. Addenda during Phase 1 will be numbered consecutively and released to all Bidders via *Cal eProcure*. Each addendum will be accompanied by a Change Log that lists all revisions. Addenda after Phase 1 will be released only to the Bidders who are invited to subsequent phases.

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](#).

Addenda issued with only Key Action Dates revisions or corrections to minor ambiguities or other similar errors, may not include a question and answer period.

2.4.7. COST FOR DEVELOPING PROPOSAL

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

2.4.8. SIGNATURE OF PROPOSAL

The Bidder must submit an ATTACHMENT 5: COVER LETTER FORM with its Phase 1 and Phase 2 Proposal responses. The Cover Letter shall be considered an integral part of the Proposal and any proposal form requiring signature, must be signed by an individual authorized to bind the bidding firm contractually. The signature block must also indicate the title of the individual holds in the firm signing the Cover Letter.

A title page or cover page with submission details and a company logo are acceptable, however.

An unsigned Proposal may be rejected.

2.4.9. IRREVOCABLE OFFER

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

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

2.4.10. FALSE OR MISLEADING STATEMENTS

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

2.4.11. 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.

2.4.12. JOINT BIDS

A joint proposal [two (2) or more Bidders quoting jointly on one (1) bid] may be submitted and each participating Bidder must sign the joint bid. If the Contract is awarded to joint Bidders, it shall be one indivisible Contract. Each joint Contractor will be jointly and severally responsible for the performance of the entire Contract, and the joint Bidders must designate, in writing, one individual having authority to represent them in all matters relating to the Contract. The State assumes no responsibility or obligation for the division of orders or purchases among joint Contractors.

2.5. BIDDING STEPS

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

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

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. Prior to submitting a response, all Bidders must register and submit ATTACHMENT 2: INTENT TO BID FORM as detailed in [SECTION 2.2.3. INTENT TO BID](#) and a ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM as detailed in [SECTION 2.2.5. CONFIDENTIALITY STATEMENT](#).

However, Bidders must sign and submit ATTACHMENT 2: INTENT TO BID FORM and ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM to the Procurement Officer, if requesting access to the Bidders' Library.

All Bidders must also submit a Pre-Qualified Electronic Vendor Application of Qualifications (eVAQ) as detailed in [SECTION 3.1.1. ELECTRONIC VENDOR APPLICATION OF QUALIFICATIONS \(eVAQ\)\(M\)](#).

2.5.1. PHASE 1 - ADMINISTRATIVE, BIDDER QUALIFICATION REQUIREMENTS AND REFERENCES, AND FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS

Bidders must complete and obtain approval/accepted status of their Electronic Vendor Application of

Qualifications (eVAQ) online application by the Phase 1 Proposal due date (Please note, it is recommended that Bidders allow a minimum of four (4) weeks before Phase 1 proposal due date for the State to process the application approval/accepted status).

The objective of Phase 1 is to evaluate each proposal and notify all compliant Bidders to participate in Phase 2. This solicitation contains all the information necessary for Bidders to complete and submit a Phase 1 response.

Phase 1 will include the following:

- Bidder obtains an approved/accepted status application to the Electronic Vendor Application of Qualifications (eVAQ) site detailed in [SECTION 3.1.1. ELECTRONIC VENDOR APPLICATION OF QUALIFICATIONS \(eVAQ\)\(M\)](#).
- Bidder submits its Phase 1 Proposal, which includes Administrative, Bidder Qualifications, Bidder References, and Functional and Non-Functional Requirements Workbook.
- The State evaluates the Phase 1 responses based on the evaluation criteria detailed in [SECTION 6. EVALUATION](#).
- Following the Phase 1 evaluation, the State will advance and notify all compliant Bidders to participate in Phase 2 of the solicitation.

2.5.2. PHASE 2 - KEY STAFF QUALIFICATIONS AND KEY STAFF REFERENCES, PHASE 2 NARRATIVE RESPONSES, AND COST RESPONSE

Bidders who are invited to participate in Phase 2 of the solicitation will be required to submit their Phase 2 Proposal by the date specified in [SECTION 2.3. KEY ACTION DATES](#).

The objective of Phase 2 is to evaluate each proposal and select up to three (3) of the highest scoring and compliant Bidder that meet the State's minimum requirements to advance to Phase 3 — Negotiations. This solicitation contains all the information necessary for Bidders to complete and submit a Phase 2 Proposal.

Phase 2 will include the following:

- Bidder submission includes Key Staff Qualifications, Key Staff References, Phase 2 Narrative Responses and Cost Workbook.
- State evaluation of the Phase 2 responses based on the evaluation criteria detailed in [SECTION 6. EVALUATION](#).
- State evaluation of Cost Workbook

- Notification to Bidder(s) advancing to Negotiations

2.5.3. PHASE 3 - NEGOTIATIONS

The State will conduct negotiations under PCC § 6611 as detailed in [SECTION 7. PHASE 3: NEGOTIATIONS](#). The purpose of the negotiation process is to maximize the State's ability to obtain a value effective solution based on the requirements and the evaluation factors set forth in the solicitation.

Following Proposal Rank Determination, described in [SECTION 6.4.5. PROPOSAL RANK DETERMINATION](#), the State will invite and proceed with negotiations with the highest-scoring compliant Phase 2 Bidder and proceed to negotiations, following which the State may award a contract. If the State cannot come to an agreement with the highest-scoring compliant Bidder, including agreement to the Bidder's proposed Key Staff, the State will invite and proceed with negotiations with the next highest-scoring compliant Phase 2 Bidder. This Bidder negotiation selection process will continue until the State completes negotiations with the final selected Phase 2 Bidder. The negotiations may or may not result in a Contract award.

This Bidder negotiation selection process will continue until the State completes negotiations with the final selected Phase 2 Bidder. The negotiations may or may not result in a Contract award.

2.5.4. WITHDRAWAL AND RESUBMISSION/MODIFICATION OF PROPOSALS

A Bidder may withdraw its proposal at any time prior to the proposal submission due date and time 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 of the relevant phase specified in [SECTION 2.3. KEY ACTION DATES](#). Modifications offered in any other manner, oral or written, will not be considered. Other than as allowed by law, proposals cannot be changed after the respective deadline date and time designated for receipt, except as provided in the solicitation.

2.5.5. 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.

3. PROPOSAL REQUIREMENTS

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

Additional administrative requirements for this solicitation are being processed through the electronic Vendor Application of Qualifications (eVAQ). Please refer to [SECTION 3.1.1. ELECTRONIC VENDOR APPLICATION OF QUALIFICATIONS \(eVAQ\)\(M\)](#) for more information.

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

1. (M) Sections labeled as “Mandatory” or “M” are not negotiable. To be considered responsive to these requirements, all requirements identified as (M) must receive a response from the Bidder. Failure to respond to any (M) requirements where indicated shall result in a “fail” and disqualification of the proposal.
2. (MS) Sections labeled “Mandatory Scored” or “MS” are not negotiable. To be considered responsive to these requirements, all requirements identified as (MS) must receive a response. Failure to respond to any (MS) requirement where indicated shall result in a “fail” and disqualification of the proposal. The State’s evaluation team will review responses to (MS) requirements and award points, if applicable, per criteria stated in [SECTION 6. EVALUATION](#).
3. (MO) Sections labeled “Mandatory Optional” or “MO” are not negotiable. To be considered responsive to these requirements, all requirements identified as (MO) must receive a response. Failure to respond to any (MO) requirement where indicated shall result in a “fail” and disqualification of the proposal. It is at the State’s option/discretion whether to utilize the option in the Contract.
4. (DS) Sections labeled “Desirable Scored” or “DS” are not required to be offered by the Bidder in order to be responsive to 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. PRE-QUALIFICATION REQUIREMENTS

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

clarifications after Phase 1 proposal due date for any prequalification requirements.

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

It is the responsibility of the Bidder to ensure they have an OSTP-approved or accepted eVAQ and all applicable requirements and provisions for this solicitation are met. Failure to have an OSTP-approved or accepted eVAQ prior to Phase 1 proposal 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 the Phase 1 proposal due date.

The State's eVAQ is an **external process to this solicitation**. The intent of the pre-qualification is to process as many of the administrative requirements required to do business in the State of California in advance to streamline the solicitation process. Bidders are required to have an OSTP-approved or accepted eVAQ application on file prior to the last day to submit Phase 1 Proposals as specified in [SECTION 2.3. KEY ACTION DATES](#) in order for your proposal to be accepted for evaluations.

The eVAQ application can be accessed at the OSTP Vendor Portal at the following URL:

<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. Bidders should allow no fewer than four (4) weeks to process an eVAQ application.

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

1. The eVAQ is a CDT OSTP-approved or accepted 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.

3.1.1.1. INCORPORATION OF EVAQ REQUIREMENTS (M)

The Contract awarded as a result of the solicitation shall automatically incorporate by reference all requirements as well as the Terms and Conditions of the eVAQ. The Bidder's eVAQ, in its entirety, shall remain in effect after eVAQ expiration, and throughout the life of the Contract awarded as a result of this solicitation, including all optional years.

In the event there is inconsistent requirements between the solicitation and the Bidder's OSTP approved

eVAQ documents, the solicitation documents shall take precedence.

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

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

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

Access to the file-sharing site will be granted within three (3) working days after receiving the email request, [SECTION 2.2.3. INTENT TO BID](#) and [SECTION 2.2.5. CONFIDENTIALITY STATEMENT](#).

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

3.2. ADMINISTRATIVE REQUIREMENTS

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

3.2.1. COVER LETTER (M)

The Bidder must complete and submit ATTACHMENT 5: COVER LETTER FORM with its Phase 1 and Phase 2 proposals.

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 6: RESPONSE TO ADMINISTRATIVE REQUIREMENTS FORM with its Phase 1 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 in accordance with [SECTION 2.4.1. IDENTIFICATION AND CLASSIFICATION OF SOLICITATION REQUIREMENTS](#).

If a Bidder fails to submit documents to meet Optional administrative requirements, the Bidder will be deemed to have not met the Optional administrative requirements and no points will be awarded for those requirements. No penalty will be assessed for failure to respond to Optional administrative requirements.

3.2.3. CONFIDENTIALITY STATEMENT (M)

The Bidder must agree to the State's confidentiality requirements by submitting a signed ATTACHMENT 4: 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 Confidentiality Statement form will be required to be submitted with your Phase 1 Proposal.

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 is 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 (M)

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 (M)

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

3.2.6. SUBCONTRACTORS (M)

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

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

Contractor understands and agrees to comply with the requirements set forth in Military and Veterans Code, Section 999 et seq. that award of this contract should 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. The Contractor is solely responsible for any payments to or claims made by subcontractors.

3.2.6.1. BIDDER DECLARATION FORM (M)

The Bidder must complete and submit ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105, with its Phase 1 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 Phase 1 Proposal. The form is available at:

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

3.2.7. AMENDMENT (M)

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

3.2.8. FINANCIAL RESPONSIBILITY INFORMATION (M)

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

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

3.2.9. GENERAL PROVISIONS (M)

For this RFP, the Bidder shall develop the WaterTAP system utilizing Salesforce Cloud and either Microsoft Azure or Amazon Web Services (AWS). This work must be conducted within SWRCB's existing tenants. This ensures seamless integration with SWRCB's existing infrastructure and leverages the robust capabilities of these platforms to deliver a scalable, secure, and efficient solution.

3.2.9.1. INFORMATION TECHNOLOGY - GENERAL PROVISIONS - CLOUD - COMPUTING SERVICES (CLOUD) (REVISED AND EFFECTIVE 2/20/2025) (M)

If the Bidder's solution includes commercial Software as a Service (SaaS) as part of the solution, the Contract awarded as a result of this solicitation shall automatically incorporate by reference the "Information Technology - General Provisions - Cloud - Computing Services, DGS PD 402-ITGP (Cloud) (Revised and Effective 2/20/2025)," which can be found at the following URL:

Information Technology - General Provisions - Cloud - Computing Services, DGS PD 402-ITGP (Cloud) (Revised and Effective 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.

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

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

Bidder must notify the State in writing if it: (1) intends to provide GenAI as a deliverable to the State; or (2) intends to utilize GenAI, including GenAI from third parties, to complete all or a portion of any deliverable that materially impacts: (i) functionality of a State system, (ii) risk to the State, or (iii) Contract performance.

For avoidance of doubt, the term "materially impacts" shall have the meaning set forth in State Administrative Manual (SAM) [4986.2](#).

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

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

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

3.2.11. STATEMENT OF WORK (M)

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

The Bidder is advised that deviations to the SOW may be the basis for rejection of the Bidder's proposal. Refer to EXHIBIT A: STATEMENT OF WORK.

3.2.12. INSURANCE COVERAGE (M)

In accordance with EXHIBIT A: STATEMENT OF WORK, [SECTION 19. 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, the Contractor shall provide a waiver of subrogation in favor of the State for its workers' compensation policy.

The Prime Contractor shall agree to furnish the State with satisfactory evidence of insurance within ten

(10) calendar days of Contract award.

3.2.12.1. WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY (M)

The Prime Contractor shall maintain statutory workers' compensation and employer's liability coverage for all its employees who will be engaged in the performance of the Contract, including special coverage extensions where applicable. In addition, an employer's liability limits of one million dollars (\$1,000,000) shall be required. By signing this contract, the Contractor acknowledges compliance with these regulations.

The Bidder is required to submit and sign an ATTACHMENT 8: WORKERS' COMPENSATION CERTIFICATION and submit it with its Phase 1 Proposal.

The Prime Contractor shall agree to furnish the State with satisfactory evidence of this insurance coverage within ten (10) calendar days of the contract award date.

3.2.13. SOCIOECONOMIC PROGRAMS

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

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

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

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

The Bidder must complete and submit ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES, with its Phase 1 Proposal. The Bidder must indicate on ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES whether it is or is not claiming each preference and/or incentive.

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

3.2.13.2. DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PROGRAM

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

Information regarding the DVBE Program Requirements may be viewed at:

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

The Bidder who has been certified by California as a DVBE (or who has obtained the participation of subcontractors certified by California as a DVBE) must submit a completed form(s) STD.843 Disabled Veteran Business Declarations for each DVBE. All disabled veteran owners and disabled veteran managers of the DVBE(s) must sign a form for each DVBE and submit as ATTACHMENT 10: DVBE DECLARATIONS with its Phase 1 Proposal.

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

3.2.13.2.1. DVBE PARTICIPATION REQUIREMENT

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

3.2.13.2.2. DVBE INCENTIVE (O)

In accordance with Military and Veterans Code §999.5(a), an incentive will be given to all Bidders who claim and exceed the three percent (3%) DVBE 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%).

If the Bidder is claiming a DVBE incentive, the Bidder must complete and submit the following with its Phase 1 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 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION.

If the Bidder's DVBE incentive amount changes in Phase 2 from what was submitted in Phase 1, the Bidder must provide an updated

1. ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105,;
2. ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES; and,
3. ATTACHMENT 10: DVBE DECLARATIONS; and,
4. ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION.

If the Bidder is not using subcontractors, the Bidder is still required to complete ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105, answer the applicable questions on the form and submit with its Proposal. Refer to [SECTION 6. EVALUATION](#) for details on the amount and application of the incentive during proposal evaluation.

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

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

DGS PD 843 is available at:

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

3.2.13.3. SMALL BUSINESS PREFERENCE (O)

The California Government Code §14835 et seq. requires that a five percent (5%) preference be given to Bidders who qualify as a Small Business (SB). The rules and regulations of this law, including the definition of an 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 an 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 Phase 1 proposal for each SB:

1. [ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105](#);
2. [ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES](#) and,
3. [ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION \(CUF\) CERTIFICATION](#)

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

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

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

Bidders claiming the five percent (5%) preference must commit to subcontract at least 25 percent (25%) of the net proposal price with one (1) or more California-certified small businesses. Completed certification applications and required support documents must be submitted to the Office of Small Business and DVBE Services (OSDS) no later than 5 p.m. of the proposal due date, and the OSDS must be able to approve the application as submitted. Questions regarding certification should be directed to the OSDS at (916) 375-4940.

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

If the Bidder is claiming a non-small business using small business or microbusiness subcontractors, the Bidder must complete and submit the following with its Phase 1 Proposal for each SB/MB Subcontractor:

1. [ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105](#);

2. ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES; and,
3. ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION

If the Bidder is not using subcontractors, the Bidder must respond to the applicable questions on the GSPD-05-105 form and submit it as ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105 with its Phase 1 Proposal.

3.2.13.5. COMMERCIALLY USEFUL FUNCTION (M)

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 Phase 1 proposal an ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION for each Small Business, Micro 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, microbusiness 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, microbusiness and small business programs, respectively.

If the Bidder is not using subcontractors, the Bidder must respond to the applicable questions on the GSPD-05.105 form, and submit it as ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105 with its Phase 1 Proposal.

If the Bidder's SB/MB/DVBE participation changes in Phase 2 from what was submitted in Phase 1, the Bidder must provide an updated ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION.

Bidder(s) may be required to submit additional written clarifying information regarding CUF on ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION. Failure to submit the requested written information as specified may be the basis for rejection of the Bidder's proposal.

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

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

Bidders that wish to take advantage of this preference will need to review the website at the URL below and submit the appropriate response forms listed with its Phase 1 Proposal as ATTACHMENT 11: TACPA PREFERENCE REQUEST FORMS. The Bidder's Phase 1 Proposal may omit these if there is no intention to claim this preference.

The required applications/forms are as follows:

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

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

3.2.14. 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 3-1, Productive Use Timeframes below. 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 submission and throughout Contract duration.

3.2.14.1. CUSTOMER IN-USE (M)

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 3-1 below and prior to the Phase 1 Proposal submission.

Table 3-1: Productive Use Timeframes

PRODUCT	PROJECT COST	PROPOSAL SUBMISSION
Category 1 - Critical Software Software that is required to control the overall operation of a computer system or peripheral equipment. Included in this category are operating systems, database management systems, language interpreters, assemblers and compilers, communications software, and other essential system software.	Less than \$10,000	1 month
	\$10,000 up to \$100,000	3 months
	More than \$100,000	6 months
Category 2 - All Information Technology Equipment and Non-critical Software Information technology equipment is defined in SAM §4819.2.	Less than \$10,000	1 month
	\$10,000 up to \$100,000	3 months
	More than \$100,000	4 months

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

3.2.14.2. CUSTOMER REFERENCES FOR PRODUCTIVE USE REQUIREMENTS (M)

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

The State has the option to request the Bidder to provide a list of customers who presently have the bid equipment and/or software installed and operating. If requested, the list must include at least one (1) customer meeting that requirement. However, at least one customer reference must be included for each

type of machine and feature bid that is subject to the requirements of that section (i.e., one customer having the specific CPU).

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

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

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

3.2.14.3. HARDWARE/EQUIPMENT (M)

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

3.2.14.4. OPEN SOURCE SOFTWARE REQUIREMENTS (M)

If the Bidder's proposed solution includes Open Source software, the Open Source software must adhere to [SECTION 3.2.14. PRODUCTIVE USE REQUIREMENTS](#), CDT Technology Letter #TL 18-02, SAM 4819.2, and SAM 4984; ITPL-01. The CDT Technology Letter #TL 18-02 can be found at the following URL:

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

3.3. QUALIFICATION REQUIREMENTS

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

The Bidder must meet the mandatory Bidder Qualification and Key Staff Qualification Requirements.

Failure to meet any of the mandatory requirements may result in a proposal being deemed non-responsive and therefore disqualified.

3.3.1. BIDDER QUALIFICATIONS (M) (DUE WITH PHASE 1 RESPONSE)

The Bidder must complete and submit, as part of its Phase 1 Proposal, ATTACHMENT 14: BIDDER QUALIFICATIONS FORM, to confirm that the Bidder possesses the experience and meets the mandatory requirements. It is incumbent upon the Bidder to provide enough detail in its Phase 1 Proposal to evaluate the Bidder's ability to meet the requirements and perform the services as described in this solicitation.

The Bidder may cite at least three (3) projects and no more than five (5) projects to confirm the Bidder as a firm possesses the experience to meet each of the mandatory qualifications specified. Any given project cited may meet multiple requirements. 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 otherwise noted, all Bidder experience cited must have occurred within twelve (12) years prior to the solicitation release date for all projects. If the referenced project is ongoing, then the project end date will be the solicitation release date. See the [SECTION 2.3. KEY ACTION DATES](#).

A separate ATTACHMENT 14: BIDDER QUALIFICATIONS FORM must be submitted for each cited project used to meet the corresponding mandatory qualifications. Descriptions of experience must be adequately detailed so that the State can easily confirm that the Bidder's experience fulfills the mandatory qualifications. If the State cannot determine that the years of experience meet the mandatory qualifications, then the Bidder's proposal may be deemed non-responsive.

Unless stated otherwise, all experience must have occurred within twelve (12) years prior to the solicitation release date for all projects and must have been completed in the United States of America. SWRCB requires that for all projects referenced that the Bidder is the Prime Contractor.

Refer to [SECTION ATTACHMENT 13: BIDDER QUALIFICATIONS FORM — INSTRUCTIONS](#) for further requirements and instructions.

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

3.3.2. BIDDER REFERENCES (M) (DUE WITH PHASE 1 RESPONSE)

The Bidder must complete and submit as part of its Phase 1 Proposal, ATTACHMENT 15: BIDDER REFERENCE FORM for each of the projects cited on the corresponding ATTACHMENT 14: BIDDER

QUALIFICATIONS FORM.

The purpose of the Bidder reference requirement is to provide the State with the ability to evaluate the Bidder's experience in providing similar or relevant services to other organizations through a 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 evaluate the similarity of those projects to the work anticipated for the Contract resulting from this solicitation.

Prior to the Bidder using a current State employee as a Bidder reference, the Bidder shall contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#), to ensure the current State employee is not a member of the Evaluation Team or a State Water Resources Control Board Division of Drinking Water State employee, a State Water Resources Control Board Division of Information Technology employee, or Contractor. In addition, only one (1) reference from the California State Water Resources Control Board (SWRCB) is permitted for this solicitation.

To be considered responsive, each ATTACHMENT 15: BIDDER REFERENCE FORM must be completed in its entirety, signed (electronic signature acceptable), and dated by the Bidder's reference contact on the project cited to be considered responsive. The customer-signed reference forms must be returned to the Bidder for submission with the Bidder's Phase 1 Proposal. Photocopies may be acceptable as long as the form, response and signature are legible. No information corrections or changes may be made to the Bidder reference forms by the Bidder.

References must meet the following criteria:

- Must be from the company (customer) or the Agency for which the project was developed and/or services provided.
- Must be someone who performs a management or supervisory role on the referenced project.
- Must be external to the Bidder's organization and corporate structure.
- Must not be from employees or individuals who have or are currently working for the Bidder.
- Must not be an employee of the Water Board Division of Drinking Water or Division of Information Technology
- A contract and all amendments to it are considered as one (1) project. Amendments to a contract cannot be submitted as separate projects.
- Must be able to provide an objective evaluation of the proposed Bidder's performance.

If a reference is not permitted either legally or by company/organization policy to sign the reference form, the reference must type or print its full name on the form.

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

Refer to ATTACHMENT 15: BIDDER REFERENCE FORM for detailed instructions on how to fill out the Bidder Reference forms.

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

3.3.3. KEY STAFF QUALIFICATIONS (M/DS) (DUE WITH PHASE 2 RESPONSE)

The Bidder must complete and submit, as part of its Phase 2 Proposal, all required Key Staff Qualifications forms (See Attachment 16), to confirm that each of the proposed ten (10) Key Staff possesses the experience and meets the mandatory requirements as specified for their respective Key Staff project role. It is incumbent upon the Bidder to provide enough detail in its Phase 2 Proposal to evaluate each Key Staff's ability to meet the requirements and perform the services as described in this solicitation.

The Bidder is fully responsible for all necessary staffing resources to successfully implement the WaterTAP solution requirements within the agreed-upon schedule and to perform to the standards set forth in the EXHIBIT A: STATEMENT OF WORK, [SECTION 12. SERVICE LEVEL AGREEMENTS \(SLAS\)](#). The Bidder's Key Staff consists of a minimum of ten (10) Contractor Key Staff required by the Bidder to fill the roles required in the SOW to implement the WaterTAP solution. Additional Contractor staff may also be necessary, at no additional cost to the State.

The Bidder may cite no more than five (5) projects for each of the Key Staff roles to confirm the proposed Key Staff meet the respective mandatory qualifications specified. A given project cited may meet multiple qualifications.

All Key Staff experience cited must have occurred within twelve (12) years prior to the solicitation release date for all projects and must have been completed in the United States of America. If the referenced project is ongoing, then the project end date will be the solicitation release date. See [SECTION 2.3. KEY ACTION DATES](#). SWRCB requires that, for all projects referenced, that the Bidder is the Prime Contractor.

A separate Key Staff Qualification Form (See Attachment 16) must be submitted for each cited project used to meet the corresponding mandatory qualifications. Descriptions of experience must be adequately detailed so that the State can easily confirm that the Bidder's experience fulfills the mandatory

qualifications. If the State cannot determine that the years of experience meet the mandatory qualifications, then the Bidder's proposal may be deemed non-responsive.

Each cited project for each proposed 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 following Key Staff roles are required to perform the services as described in EXHIBIT A:
STATEMENT OF WORK:

1. Engagement Director/ Executive — Primary Point of Contact
2. Project Manager — Task, Timeline, Budget Management, and Other Project Management Functions Through all Phases of SDLC
3. Senior Data Architect — Database Design with Enterprise and Cohesiveness Focus
4. Senior Software Solutions Architect — Architects and Designs Modules and Ensures Interoperability
5. Senior Business Analyst — Functional Design Development and Integration
6. Training Lead — Training and Knowledge Transfer Planning, Material Development, and Delivery
7. Senior Test and Validation Lead — Testing, Validation, and Training and Knowledge Transfer Development and Implementation
8. Technical Lead — Technical Documentation Development and Management
9. Organizational Change Management Lead — Organizational Change Management Preparation and Implementation
10. GIS Solution Expert — GIS Integration and Spatial Analysis Tools Development and Management

The term "Key Staff" refers to Contractor or Subcontractor staff roles deemed by SWRCB to be essential to the Contractor's satisfactory performance of the requirements. All listed Key Staff are expected to be fully dedicated (100% availability, with full coverage by comparably-experienced staff during leave and vacation) and available through all phases.

Because of the complexity and focus required to meet the provisions of the Contract, sharing of roles is **NOT** permitted for the Key Staff roles except for the Training Lead role and Organizational Change Management Lead role. However, adding additional staff to support the activities and responsibilities of these roles is highly recommended.

Refer to ATTACHMENT 16: KEY STAFF QUALIFICATIONS FORM - INSTRUCTIONS for further

instructions.

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

3.3.4. KEY STAFF REFERENCES (M) (DUE WITH PHASE 2 RESPONSE)

The Bidder must complete and submit as part of its Phase 2 Proposal, ATTACHMENT 17: KEY STAFF REFERENCE FORM, to confirm each proposed Key Staff member possesses the experience and meets the mandatory qualifications. An ATTACHMENT 17: KEY STAFF REFERENCE FORM is required for each of the projects cited on the corresponding Key Staff Qualifications Form (See Attachment 16).

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

Prior to any proposed Key Staff using a current State employee as a Key Staff reference, the Bidder shall contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#), to ensure the current State employee is not a member of the Evaluation Team or a State Water Resources Control Board, Division of Drinking Water State employee or Contractor. In addition, only one (1) reference from the California State Water Resources Control Board (SWRCB) is permitted for this solicitation.

To be considered responsive, each ATTACHMENT 17: KEY STAFF REFERENCE FORM must be completed in its entirety, signed (electronic signature acceptable), and dated by the respective Key Staff's reference contact on the project cited to be considered responsive. The Key Staff customer-signed reference forms must be returned to the Bidder for submission with the Bidder's Phase 2 Proposal. Photocopies may be acceptable as long as the form, response and signature are legible. No information corrections or changes may be made to any Key Staff reference forms by the Bidder.

References must meet the following criteria:

- Must be from the company (customer) or the Agency for which the project was developed and/or services provided.
- Must be someone who performs a management or supervisory role on the cited project.
- Must be external to the Bidder's organization and corporate structure.

- Must not be employees or individuals who are currently working for the Bidder.
- A contract and all contract amendments are considered as one (1) project. Amendments to a contract cannot be submitted as separate projects.
- Must be able to provide an objective evaluation of the proposed Key Staff's performance.

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

References may be contacted to validate submitted responses based on customer rating 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.

Refer to ATTACHMENT 17: KEY STAFF REFERENCE FORM for detailed instructions on how to fill out the Key Staff Reference forms.

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

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

For each experience requirement (marked by "x") that is met or partially met on the cited project, specify the number of full-time month equivalents (FTEs) experience that the Staff person accrued on the cited project. For each period in which the Staff person 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) FTE experience.

To calculate and report the FTE experience of Staff who worked part-time (partial) on a cited project, use the following calculation:

If the Staff worked half ($\frac{1}{2}$) time on a cited 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 workdays in a month.

For each experience requirement that the Staff's work on a cited 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 calendar period during which the Staff worked on the cited project and whether he/she/they 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.

3.4. SOLUTION REQUIREMENTS

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

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

3.4.1. FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS (MS) (DUE WITH PHASE 1 RESPONSE)

The Bidder must complete and submit, as part of its Phase 1 Proposal, EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS. An explanation of the exhibit columns and instructions for completion are available in EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

For each Mandatory Scored (MS) requirement, the Bidder must provide a response in the column titled "Available in System" to specify whether the proposed system will meet the requirement. The Bidder must indicate in the 'Available in System' column how the requirement will be met:

- B - Out of the Box (OOTB): The requirement can be met in its baseline form that is native to the solution and available immediately without customization, modification, configuration, additional software, third party tools, or processes of any kind. Requirement is met "Out of the Box."
- C - Update to code. The code must be modified to meet the requirement.
 - L (0–40 hours) = Low LOE. 0–40 hours required to make necessary customizations (e.g. minor to moderate code changes, addition of new attributes and related GUI updates) **For this value, a narrative response within the "Comment" column is required.** The response shall include the type of work required for the customization work itself and a rough order of magnitude (ROM) estimate of effort (do not include design, testing, or other effort beyond the customization work).
 - H (41+ hours) = High LOE. 41+ hours required to make necessary customizations (e.g.

code changes in multiple modules, addition of a function that impacts solution architecture)
For this value, a narrative response within the "Comment" column is required. The response shall include the type of work required for the customization work itself and a rough order of magnitude (ROM) estimate of effort (do not include design, testing, or other effort beyond the customization work).

- T - Third-party software integration required. The requirement can be met with the integration of third-party software. **For this value, a narrative response within the "Comment" column is required.** Name the application/tool and indicate why it is not included in the proposed solution. An example might be an Integrated Development Environment already broadly available at SWRCB and not requiring additional licensing.
- U — Unable to meet the requirement. The requirement cannot be met by the proposed Solution. **For this value, a narrative response within the "Comment" column is required.**
- If no response is indicated, the State will assume the Solution is unable to meet the requirement.

Detailed instructions are provided in the "Instructions" tab in the EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS, which include that the Bidder must provide comments in the appropriate column if the requirement cannot be met out-of-the-box.

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

A blank or 'U - Unable to Meet Requirement' response to any mandatory scored requirement in the format specified above may result in the response being considered non-responsive.

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 the EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS evaluation.

3.4.2. DELIVERABLES AND MILESTONES TABLE (M) (DUE WITH PHASE 1 RESPONSE)

The Bidder must complete and submit as part of its Phase 1 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 "Contractor Agrees to Provide the Deliverable? 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) (DUE WITH PHASE 2 RESPONSE)

The purpose of the narrative response requirement is to provide the project team with how the proposed Bidder would manage, develop, and implement their proposed WaterTAP solution. The Bidder must provide various narratives as shown in ATTACHMENT 18: PHASE 2: NARRATIVE RESPONSE REQUIREMENTS, submit Phase 2 Narrative Responses as detailed in [SECTION 5.4. PROPOSAL CONTENT AND STRUCTURE](#) and [SECTION 5.5. RESPONSE TO SOLICITATION REQUIREMENTS](#).

The Narrative Responses must not simply restate or paraphrase information in this solicitation. The Narrative Responses shall not exceed the number of pages specified in ATTACHMENT 18: PHASE 2: NARRATIVE RESPONSE REQUIREMENTS. Although submitted in digital format, Narrative Responses may be printed by the State during the evaluation process. If printed, 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.

Below is a high-level list of the narrative questions/topics:

Phase 2 Narratives:

1. Proposed Solution Approach
2. Product — Solution Requirements
3. Product — Solution Architecture
4. User Experience
5. Data Management
6. Testing Approach
7. Development Framework

Failure to submit responses to the mandatory scored narrative topics in the format specified above may result in the response being considered non-responsive.

The Bidder must complete and submit ATTACHMENT 18: PHASE 2: NARRATIVE RESPONSE

REQUIREMENTS as part of their Phase 2 Proposal, in accordance with the instructions and requirements specified in the respective attachment.

The Bidder must not alter the structure or the content of ATTACHMENT 18: PHASE 2: NARRATIVE RESPONSE REQUIREMENTS.

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

4. COST

Cost is a primary evaluation criterion weighted at thirty percent (30%) of the total points and will be evaluated in Phase 2. Evaluation in this category will be based on the lowest total estimated net cost as calculated according to the methodology in this section and [SECTION 6. EVALUATION](#).

This section contains the mandatory scored and mandatory optional cost requirements that must be met in order to be considered responsive to this solicitation. All proposed costs for all deliverables as shown on the EXHIBIT E: COST WORKBOOK must be all-inclusive, thereby including the cost of any and all services required in EXHIBIT A: STATEMENT OF WORK.

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. The Bidder is required to enter all cost data in the format prescribed by EXHIBIT E: COST WORKBOOK.

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

The Bidder is advised that failure to comply with the instructions listed in [SECTION 5.5.3. PHASE 2: COST WORKBOOK](#), 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.

Important Note: 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 Phase 2, Cost, as a separate attachment, in accordance with [SECTION 5. PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS](#).

4.1. COST CONSIDERATIONS

Implementation Costs:

One-time costs or implementation costs are those costs paid by the State for material and services necessary for the acquisition and implementation of the proposed Solution. These costs are fixed-cost deliverables.

The following are examples of one-time costs:

- Design and Development — utilizing EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS, configuring a solution to support mandatory requirements
- Implementation and Training - testing, defect resolution, go-live planning, implementation, training and services necessary to affect an operational system.

Ongoing Costs:

Ongoing costs are those costs that are projected to be paid by the State to the Contractor on a monthly basis or some other recurring basis during the term of the Contract. Any discounts offered to the State shall be reflected in the monthly invoices (adjusted rates). In addition, for evaluation purposes, continuing costs include any cost adjustments that are applied monthly (e.g., price escalations and equipment failure costs).

The following are examples of continuing costs:

- Solution maintenance and operational costs
- Software subscriptions, licensing and/or upgrades for Contractor-provided software and tools
- CDT, Data Center Service, Cloud Service Costs

Unanticipated Tasks Cost:

These are costs for additional design, development, and implementation work that must be performed and is within scope, but was not identified in the State's solicitation document or SOW.

The following is an example of unanticipated tasks cost:

- Staff Hourly Rates

4.2. PRICE ESCALATION

Bidders must not include any cost escalation factor in the rates proposed in the EXHIBIT E: COST WORKBOOK.

4.3. COST WORKBOOK (MS/MO) (DUE WITH PHASE 2 RESPONSE)

The Bidder must submit a completed EXHIBIT E: COST WORKBOOK separately to the Phase 2: Cost folder, as part of its Phase 2 Proposal, in accordance with the requirements specified in this exhibit.

Services, features, equipment, and costs included in the EXHIBIT E: COST WORKBOOK are those that the Bidder must provide for the duration of the Contract as identified in the EXHIBIT A: STATEMENT OF WORK, which includes all optional years.

4.3.1. COST WORKBOOK INSTRUCTIONS

The EXHIBIT E: COST WORKBOOK includes multiple cost worksheets that must be completed by the Bidder and submitted with its Phase 2 Proposal to be considered responsive. All cost elements and associated costs required to implement, maintain, and operate the proposed services in support of WaterTAP must be included in the EXHIBIT E: COST WORKBOOK which the Bidder must provide for the term of the Contract as identified in the SOW, which includes all optional years.

Bidder is required to enter cost information as applicable on Tabs 3–7. 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 Cost Workbook permits limited input and editing capabilities. A detailed description of each worksheet is provided in the EXHIBIT E: COST WORKBOOK Instructions tab. 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. Any items submitted within the Bidder's EXHIBIT E: COST WORKBOOK response without a price will be considered as offered at no cost to the State. Bidders must provide individual costs and completely fill out the EXHIBIT E: COST WORKBOOK as indicated below and submit those costs with their Phase 2 Proposal.

Unless specified, all other fields must not be modified. If the Cost Workbook is modified or cells are left blank, the Bidder may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

The following list briefly describes each worksheet provided in the EXHIBIT E: COST WORKBOOK.

- Tab 1: Instructions — Instructions provided to the Bidder to complete the workbook.
- Tab 2: Cost Summary - Sheet calculates data input on sheets 3 through 6.
- Tab 3: Project Phase Calculator - Bidder enters project development phase information to ensure project completion within the 24-month timeframe identified in EXHIBIT A: STATEMENT OF WORK.
- Tab 4: Base Contract Deliverables — The Bidder enters one-time project costs to design, develop, configure, and implement the solution as defined in the SOW.
- Tab 5: Licensing Tools & Hosting Costs — Bidder enters all licensing costs, including all SaaS licensing and third-party software and tools, pertaining to development, implementation, data migration, ongoing access, support and hosting (if applicable) of the solution by phase. Hosting costs are "Mandatory Optional" and must be reported in section B of this tab but will not be scored.
- Tab 6: Maintenance & Operations - Bidder enters recurring Maintenance and Operations (M&O) service costs; this item is not evaluated for points.
- Tab 7: Staff Rate Sheet (for Unanticipated Tasks) - Bidder enters the proposed hourly rate for key staff for unanticipated tasks; this item is not evaluated for points.

Refer to the EXHIBIT E: COST WORKBOOK for additional Cost Workbook instructions.

Seven (7) days prior to the Phase 2 Proposal due date as specified in [SECTION 2.3. KEY ACTION DATES](#), the Bidder must email the Procurement Officer specified in [SECTION 2.2.1. PROCUREMENT OFFICER](#), no more than one (1) Bidder Contact who will upload the electronic files of the Bidder's Phase 2 Proposal. Once the Bidder Contact is provided to the Procurement Officer, an invitation to a file-sharing site will be sent to the specified Bidder's Contact. The Cost Workbook must be submitted at the same time as the Bidder's Phase 2 Proposal.

The Cost Workbook must be completed by the Bidder and submitted no later than the date and time identified in [SECTION 2.3. KEY ACTION DATES](#) to be considered responsive.

If a Bidder's Phase 2 proposal is determined to be non-responsive and/or not responsible during the evaluation of the Phase 2 Proposal, their respective EXHIBIT E: COST WORKBOOK

will not be opened or evaluated by the State. Refer to [SECTION 5.3. DELIVERY OF PROPOSALS](#) for further details on how to submit the Cost Workbook.

Unanticipated Tasks

The State expects that during the Contract Term, legislative and/or program changes may necessitate changes to the system and/or software and result in unanticipated tasks. Changes will be structured based on the Bidder's hourly staff rates identified in EXHIBIT E: COST WORKBOOK. These rates will be used to support change requests and/or amendments to the Contract. An unanticipated task is additional work that must be performed, but was not identified in the State's solicitation documents or SOW. Both the State and the Contractor, through the Change Control process, must agree upon the work to be performed, which will result in unanticipated costs through the use of EXHIBIT I: WORK ORDER AUTHORIZATION FORM. No work can be performed in advance of the State's agreement of unanticipated tasks.

Both the State and the Contractor must agree upon the work that needs to be performed which will result in unanticipated costs through the EXHIBIT I: WORK ORDER AUTHORIZATION FORM. No work can be performed in advance of State's agreement of unanticipated tasks.

The State limits the budget for unanticipated tasks to not exceed ten percent (10%) of the sum of the Bidder's Base Contract Costs.

4.4. PROJECT PAYMENT TERMS

In accordance with Public Contract Code, § 12112, the State will withhold, from each invoiced payment amount to the Contractor, an amount equal to fifteen percent (15%) of the payment per the SOW.

The payment schedule for the Water Technical Access Portal (WaterTAP) implementation is deliverable-based except for maintenance and operations (M&O) services. M&O services shall be paid monthly in arrears at the rates indicated in EXHIBIT E: COST WORKBOOK.

4.5. 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 Regulations, Title 18, §1502, subdivision (f)(1)(D).

5. PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS

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

The Bidder shall upload an electronic copy of its entire Phase 1 Proposal and Phase 2 Proposal, including the Cost Workbook, as specified in [SECTION 5.3. DELIVERY OF PROPOSALS](#). It is important that the Bidder's electronic files that comprise its Phase 1 Proposal and Phase 2 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 or incomplete, 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 there is any such defect or irregularity from the solicitation document requirements. The proposal must contain all costs as required in [SECTION 4. COST](#) and [SECTION 5. PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS](#).

The Bidder is required to thoroughly review the solicitation to ensure its proposal is fully compliant with the solicitation requirements to thereby avoid the possibility of being ruled non-compliant and/or non-responsive.

5.3. DELIVERY OF PROPOSALS

Seven (7) days prior to the Phase 1 Proposal and Phase 2 Proposal due dates as specified in [SECTION 2.3. KEY ACTION DATES](#), the Bidder must email the Procurement Officer specified in [SECTION 2.2.1. PROCUREMENT OFFICER](#), no more than two (2) Bidder Contacts who will upload the electronic files of the Bidder's Phase 1 Proposal and Phase 2 Proposal. Once the Bidder Contacts are provided to the Procurement Officer, an invitation to a file-sharing site will be sent to the specified Bidder Contact. The Cost Workbook must be submitted at the same time as the Bidder's Phase 2 Proposal.

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 labeled "Phase 1", "Phase 2", and "Phase 2—Cost Workbook." The files must be named using the naming conventions in this section. For this section, "[company name]" will be used to describe an element of a file name and should be replaced with the name of the company or firm represented by the Bidder Contact.

The Bidder contacts will be required to upload a complete copy of the Bidder's proposal for each phase to the appropriate folders using the format identified below:

BIDDER NAME



Phase 1 - Response



Phase 2 - Response



Phase 2 – Cost Workbook

Phase 1: Response

Within the "Phase 1" folder, the Bidder Contact must upload two (2) files. One (1) for MS Word and one (1) Excel file for the bidder's response to the EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS. The file must contain all the response items listed in [SECTION 5.5. RESPONSE TO SOLICITATION REQUIREMENTS](#). The two (2) files must be named using the following naming convention:

"Request For Proposal 26-014-280 [company name] Phase 1—Response"

"Request For Proposal 26-014-280 [company name] Phase 1-Response_EXHIBIT C"

For example, a Bidder Contact submitting a proposal for a company named "Acme" will title the uploaded files in this folder as:

"Request For Proposal 26-014-280 Acme Phase 1—Response"

"Request For Proposal 26-014-280 Acme Phase 1-Response_EXHIBIT C"

Within the Phase 1-Response folder, the Bidder Contact must upload two (2) files. One (1) for the MS Word and one (1) Excel file for the Bidder's response. One file will include all the MS Word items listed above in a combined PDF file titled *"Request For Proposal 26-014-280 [company name] Phase 1-Response"* and the second file will be a filled out [SECTION EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS](#) Excel file titled *"Request For Proposal 26-014-280 [company name] Phase 1-Response_EXHIBIT C"*.

The Bidder Contact must not include the proposal cost information as part of the Phase 1- Response file. Cost information must be uploaded as its own file in a separate volume as described below. If the cost information is included within the Phase 1- Response file, the proposal may be rejected.

Phase 2: Response

Within the Phase 2-Response folder, the Bidder Contact must upload one (1) file for the MS Word. The file must contain all the response items listed in [SECTION 5.5. RESPONSE TO SOLICITATION REQUIREMENTS](#). The one (1) file must be named using the following naming convention:

"Request For Proposal 26-014-280 [company name] Phase 2-Response"

For example, a Bidder Contact submitting a proposal for a company named "Acme" will title the uploaded files in this folder as:

"Request For Proposal 26-014-280 Acme Phase 2—Response"

In sum, Phase 2 will consist of only one (1) file, including all the MS Word items listed above in a combined PDF file titled *"Request For Proposal 26-014-280 [company name] Phase 2-Response."*

The Bidder Contact must not include the proposal cost information as part of the Phase 2 - Response file. Cost information must be uploaded as its own file in a separate volume as described below. If the cost information is included within the Phase 2 - Response file, the proposal may be rejected.

PHASE 2 - COST WORKBOOK

Within the Phase 2—Cost Workbook folder, the Bidder contact(s) must upload the cost information for the Phase 2 Proposal as described in [SECTION 5.4. PROPOSAL CONTENT AND STRUCTURE](#) and [SECTION 5.5.3. PHASE 2: COST WORKBOOK](#). The file must be named using the following naming convention:

"RFP 26-014-280_[company name]_Cost Workbook"

For example, a Bidder Contact submitting a Phase 2 Proposal for a company name "Acme" will title the uploaded file in this folder as:

"RFP 26-014-280_Acme_Cost Workbook."

The contents of the Cost Workbook folder will remain inaccessible to the Procurement Officer and the State Evaluation Team until Cost Evaluation. Bidders are further instructed not to apply any further encryption or file protection to the Cost Workbook file.

The Bidder's Cost Workbook shall be in MS Excel format (version 2019 or higher).

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 Phase 2 Responses as stated in [SECTION 2.3. KEY ACTION DATES](#). **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 Phase 1 Proposal response and Phase 2 Proposal response are submitted in a manner that enables the State to easily locate all response descriptions, exhibits, and attachments for each requirement of this solicitation, so that the State may easily identify completeness and responsiveness to the requirements of this solicitation. Phase 1 and Phase 2 responses must be provided separately and structured as indicated in the subsections below. 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 response(s) should be organized to identify and ensure each phase of their proposal response and Attachments/Exhibits are submitted in an electronic format and in the applicable SharePoint folders.

The Bidder must include with its proposal, a description of the Bidder's understanding of the WaterTAP project and the Bidder's role and approach to accomplish the project implementation to meet timelines and complete project deliverables.

The Narrative Responses must be in the format described in [SECTION 5.4. PROPOSAL CONTENT AND STRUCTURE](#). The combined number of pages of narrative responses shall not exceed one hundred twenty-five (125) pages. Pages must include page numbers. If the Bidder's submission exceeds the page limit, only the first 125 pages will be reviewed and evaluated.

See [SECTION 3.4.3. NARRATIVE REQUIREMENTS \(MS\) \(DUE WITH PHASE 2 RESPONSE\)](#) for complete instructions and [SECTION 6.4.2.1. PHASE 2 NARRATIVE RESPONSES EVALUATION](#) for evaluation criteria. Only the Bidders invited to Phase 2 will be required to respond to Phase 2 Narrative Requirements.

The Narrative Response must adhere to the instructions specified in [SECTION 3.4.3. NARRATIVE REQUIREMENTS \(MS\) \(DUE WITH PHASE 2 RESPONSE\)](#), and contain the content as shown in ATTACHMENT 18: PHASE 2: NARRATIVE RESPONSE REQUIREMENTS and include the following:

1. Page number (Page # of ##)
2. Title Page (not included in page limit). This must be a single page with the following information:
 - a. The name of the company represented by the Bidder Contact
 - b. The solicitation number, RFP 26-014-280
 - c. The phase title, "Phase 2"
3. Table of Contents (not included in page limit). The Bidder's response must contain a Table of

Contents. All elements of the proposal, including forms, must be identified by phase and page number. The Table of Contents must identify all figures, charts, graphs and tables, etc.

4. Separate headings to delineate sections (aligned with the Table of Contents)
5. Formatting to ensure greater ease of evaluation, by:
 - a. Use of bold headings and subheadings to easily locate information
 - b. Use of subheadings 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 subsections
 - e. Use of graphics to enhance readability of response
 - f. Avoid the use of acronyms
 - g. Provide a glossary at the end of each narrative if non-standard terminology is used (not included in the page limit)

Page numbers in the footer of the document must be sequentially numbered from the start of the document to its end.

Response components shall be submitted electronically using a Century Gothic typeface no smaller than twelve (12) point, with headers/footers and table/figures no smaller than a ten (10) point font. Documents must be formatted to fit, if printed, on letter-size (8.5" x 11") paper and have a perimeter margin of no less than one-half inch (0.5").

All proposal response files must be submitted in a searchable portable document file (PDF) (Acrobat v. 6.0 or higher) of its proposal; however, the Bidder must ensure the use of Microsoft Office version 2019 or higher (e.g., MS Word, MS Excel, MS Visio, etc.) when submitting EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS and EXHIBIT E: COST WORKBOOK.

PDF versions of documents shall be used for those submissions of the proposal that require signature.

Unless otherwise required, e-signatures or copies of an original signature are acceptable.

The Bidder must ensure that no pricing information of any type is included outside its proposal response documents, excluding its Phase 2: Cost Workbook folder. The inclusion of pricing in any fashion or format in any part of the proposal, except for Phase 2: Cost Workbook, may be the basis for immediate rejection of the Bidder's proposal. The content and structure of Phase 2 — Cost Workbook must follow [SECTION 4.3. COST WORKBOOK \(MS/MO\) \(DUE WITH PHASE 2 RESPONSE\)](#).

As stated in [SECTION 2.4.5. CONFIDENTIALITY](#), proposals marked "confidential" or "proprietary" may

exclude the Bidder from consideration for award.

Your proposal must adhere to the instructions specified in [SECTION 5. PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS](#).

5.5. RESPONSE TO SOLICITATION REQUIREMENTS

Each phase of the proposal response must be submitted separately, and must be structured in the following manner:

5.5.1. PHASE 1: ADMINISTRATIVE, BIDDER EXPERIENCE, BIDDER REFERENCES, AND TECHNICAL REQUIREMENTS

The Phase 1 Proposal Response submission must contain the following in this order:

1. Title Page
2. Table of Contents
 - a. The Bidder's Phase 1 Proposal Response must contain a Table of Contents.
 - b. All elements of the proposal, including forms, must be identified by phase number and page number. The Table of Contents must identify all figures, charts, graphs, and tables.
3. ATTACHMENT 5: COVER LETTER FORM (See [SECTION 3.2.1. COVER LETTER \(M\)](#))

A. RESPONSE TO ADMINISTRATIVE REQUIREMENTS AND THE REQUIRED ATTACHMENTS, IN THE FOLLOWING ORDER:

1. ATTACHMENT 2: INTENT TO BID FORM
2. ATTACHMENT 3: FOLLOW-ON DISCLOSURE FORM
3. ATTACHMENT 4: CONFIDENTIALITY STATEMENT FORM
4. ATTACHMENT 6: RESPONSE TO ADMINISTRATIVE REQUIREMENTS FORM
5. ATTACHMENT 7: BIDDER DECLARATION GSPD 05-105
6. ATTACHMENT 8: WORKERS' COMPENSATION CERTIFICATION
7. ATTACHMENT 9: BIDDING PREFERENCES AND INCENTIVES
8. ATTACHMENT 10: DVBE DECLARATIONS (required if claiming DVBE preference)
9. ATTACHMENT 11: TACPA PREFERENCE REQUEST FORMS
10. ATTACHMENT 12: COMMERCIALLY USEFUL FUNCTION (CUF) CERTIFICATION

B. RESPONSE TO QUALIFICATION REQUIREMENTS AND THE REQUIRED ATTACHMENTS, IN THE FOLLOWING ORDER:

1. ATTACHMENT 14: BIDDER QUALIFICATIONS FORM
2. ATTACHMENT 15: BIDDER REFERENCE FORM

C. RESPONSE TO TECHNICAL REQUIREMENTS AND THE REQUIRED EXHIBITS, IN THE FOLLOWING ORDER:

1. EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS
2. EXHIBIT D: DELIVERABLES AND MILESTONES TABLE

5.5.2. PHASE 2: KEY STAFF QUALIFICATIONS, KEY STAFF REFERENCES, AND PHASE 2 NARRATIVES

The Phase 2 Proposal Response submission must contain the following in this order:

1. Title Page
2. Table of Contents
 - a. The Bidder's Phase 2 Proposal Response must contain a Table of Contents.
 - b. All elements of the proposal, including forms, must be identified by phase number and page number. The Table of Contents must identify all figures, charts, graphs, and tables.
3. ATTACHMENT 5: COVER LETTER FORM (See [SECTION 3.2.1. COVER LETTER \(M\)](#))

A. RESPONSE TO QUALIFICATION REQUIREMENTS AND THE REQUIRED ATTACHMENTS, IN THE FOLLOWING ORDER:

1. ATTACHMENT 16.1: ENGAGEMENT DIRECTOR QUALIFICATIONS FORM
2. ATTACHMENT 16.2: PROJECT MANAGER QUALIFICATIONS FORM
3. ATTACHMENT 16.3: SENIOR DATA ARCHITECT QUALIFICATIONS FORM
4. ATTACHMENT 16.4: SENIOR SOFTWARE SOLUTIONS ARCHITECT QUALIFICATIONS FORM
5. ATTACHMENT 16.5: SENIOR BUSINESS ANALYST QUALIFICATIONS FORM
6. ATTACHMENT 16.6: TRAINING LEAD QUALIFICATIONS FORM
7. ATTACHMENT 16.7: SENIOR TEST AND VALIDATION LEAD QUALIFICATIONS FORM
8. ATTACHMENT 16.8: TECHNICAL LEAD QUALIFICATIONS FORM
9. ATTACHMENT 16.9: ORGANIZATIONAL CHANGE MANAGEMENT LEAD QUALIFICATIONS

FORM

10. ATTACHMENT 16.10: GIS SOLUTION EXPERT QUALIFICATIONS FORM
11. Certificates and diplomas (required if applicable)
12. ATTACHMENT 17: KEY STAFF REFERENCE FORM for all respective Key Staff roles in the following order:
 - a. Engagement Director
 - b. Project Manager
 - c. Senior Data Architect
 - d. Senior Software Solutions Architect
 - e. Senior Business Analyst
 - f. Training Lead
 - g. Senior Test and Validation Lead
 - h. Technical Lead
 - i. Organizational Change Management Lead
 - j. GIS Solution Expert

B. RESPONSE TO TECHNICAL REQUIREMENTS AND THE REQUIRED ATTACHMENT, IN THE FOLLOWING ORDER:

1. ATTACHMENT 18: PHASE 2: NARRATIVE RESPONSE REQUIREMENTS

5.5.3. PHASE 2: COST WORKBOOK

Phase 2 — Cost Workbook, the Bidder's response to cost, must contain the following:

1. EXHIBIT E: COST WORKBOOK must be uploaded as a single MS Excel Workbook file.

The file must meet the Excel format requirements described in [SECTION 5.4. PROPOSAL CONTENT AND STRUCTURE](#) and be titled as described in [SECTION 5.3. DELIVERY OF PROPOSALS](#).

6. EVALUATION

This section details the evaluation process and scoring procedures the State will follow to evaluate proposals submitted in response to this solicitation. The evaluation process is a multi-step review of each Bidder's proposal response to determine if the Bidder is responsive and and responsible, and whether it proposal 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.

Proposals must be complete and meet all format and submission requirements as identified in [SECTION 5. PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS](#).

Responsiveness is indicated by meeting all Administrative, Qualification, Solution and Cost Requirements, and complying with [SECTION 2.4. RULES GOVERNING COMPETITION](#). If a Bidder's proposal fails to meet a mandatory requirement, it will be considered a deviation in accordance with [SECTION 2.4.1. IDENTIFICATION AND CLASSIFICATION OF SOLICITATION REQUIREMENTS](#).

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 only SWRCB State employees, including management and staff to review and evaluate proposals. The State Procurement Officer will provide guidance and oversight to the Evaluation Team. The State may engage additional qualified individuals or subject matter experts (SMEs) during the evaluation process to assist the State in gaining a better understanding of technical, financial, legal, contractual, or program issues. These individuals do not have voting privileges or responsibility for the evaluation process and will serve solely in an advisory capacity.

6.2. PROPOSAL EVALUATION

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

Proposals will be based on compliance with all requirements, with seventy percent (70%) of the available points allocated to requirements, narratives, and qualifications. The remaining thirty percent (30%) will be allocated to Cost that are responsive and responsible to the solicitation requirements. The evaluation methodology and distribution and allocation of maximum points possible for each proposal component is provided in Table 6-1: Scoring and Point Distribution, which identifies each evaluation component, the scoring methodology, and the maximum points available for scored components.

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.

The maximum points available for this solicitation are seventeen thousand six hundred seventy (17,670) points (12,370) non-cost points, and 5,300 cost points, excluding preferences and incentives. All point calculations will be rounded to the nearest hundredth (two (2) decimal places).

Table 6-1: Scoring and Point Distribution (excludes preferences and incentives)

REQUIREMENT	SCORING ELEMENT	SCORING METHOD	MAX SCORE
REVIEW OF PROPOSALS FOR ADMINISTRATIVE COMPLIANCE			
Opening and Submission Validation	Mandatory	Pass/Fail	N/A
Administrative and Technical Review for Compliance	Mandatory	Pass/Fail	N/A
EVALUATION OF PHASE 1 REQUIREMENTS			
EVALUATION OF QUALIFICATION REQUIREMENTS			
EVALUATION OF BIDDER QUALIFICATIONS AND REFERENCES (Max. 0 points)			
Bidder Qualifications	Mandatory	Pass/Fail	N/A
Bidder Reference	Mandatory	Pass/Fail	N/A
EVALUATION OF SOLUTION REQUIREMENTS			
EVALUATION OF DELIVERABLES AND MILESTONES TABLE (Max. 0 points)			
Deliverables and Milestones Table	Mandatory	Pass/Fail	N/A

REQUIREMENT	SCORING ELEMENT	SCORING METHOD	MAX SCORE
EVALUATION OF FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS (Max. 6,185 points)			
Functional & Non-Functional Requirements	Mandatory	Scored	6,185.00
TOTAL POSSIBLE PHASE 1 POINTS			6,185.00
ALL COMPLIANT BIDDERS WILL PROCEED TO PHASE 2			
EVALUATION OF PHASE 2 REQUIREMENTS			
EVALUATION OF QUALIFICATION REQUIREMENTS			
EVALUATION OF KEY STAFF QUALIFICATIONS AND REFERENCES (Max. 3,150 points)			
1. Engagement Director/Executive	Mandatory	Pass/Fail	N/A
	Desirable	Scored	175
2. Project Manager	Mandatory	Pass/Fail	N/A
	Desirable	Scored	350
3. Senior Data Architect	Mandatory	Pass/Fail	N/A
	Desirable	Scored	175
4. Senior Software Solutions Architect	Mandatory	Pass/Fail	N/A
	Desirable	Scored	700

REQUIREMENT	SCORING ELEMENT	SCORING METHOD	MAX SCORE
5. Senior Business Analyst	Mandatory	Pass/Fail	N/A
	Desirable	Scored	525
6. Training Lead	Mandatory	Pass/Fail	N/A
	Desirable	Scored	350
7. Senior Test and Validation Lead	Mandatory	Pass/Fail	N/A
	Desirable	Scored	175
8. Technical Lead	Mandatory	Pass/Fail	N/A
	Desirable	Scored	350
9. Organizational Change Management Lead	Mandatory	Pass/Fail	N/A
	Desirable	Scored	350
10. GIS Solution Expert	Mandatory	Pass/Fail	N/A
Key Staff – Reference Forms	Mandatory	Pass/Fail	N/A
EVALUATION OF SOLUTION REQUIREMENTS			
EVALUATION OF PHASE 2 NARRATIVE REQUIREMENTS (Max. 3,035 points)			
Proposed Solution Approach	Mandatory	Scored	800.00
Product — Solution Requirements	Mandatory	Scored	375.00

REQUIREMENT	SCORING ELEMENT	SCORING METHOD	MAX SCORE
Product — Solution Architecture	Mandatory	Scored	600.00
User Experience	Mandatory	Scored	600.00
Data Management	Mandatory	Scored	350.00
Testing Approach	Mandatory	Scored	155.00
Development Framework	Mandatory	Scored	155.00
TOTAL POSSIBLE PHASE 2 POINTS			6,185.00
TOTAL POSSIBLE POINTS FOR PHASE 1 & 2 (NON-COST)			12,370.00
COST EVALUATION (Max. 5,300 points)			
Cost Evaluation	Mandatory	Scored	5,300.00
UP TO THE TOP THREE (3) HIGHEST SCORING COMPLIANT BIDDER WILL PROCEED TO NEGOTIATIONS			
MAXIMUM TOTAL POINTS AVAILABLE (WITHOUT PREFERENCE POINTS APPLIED)			17,670.00

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. EVALUATION](#).

If a Bidder's proposal fails to meet a mandatory requirement, it will be considered non-responsive.

6.2.2. BIDDER RESPONSE CLARIFICATION

The State may request that a Bidder clarify any area of their response that the State determines to be unclear. The State may also request clarification 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.

6.2.3. 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 submission, the State may, at its sole option, correct an error based on that established intent.
2. If the State discovers obvious clerical or arithmetic errors, the State may, at its sole option, correct such errors. If the mathematical correction results in significant changes to the Bidder's response, the State will provide the Bidder with the opportunity 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 Proposals, 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 compliant with the solicitation requirements and thereby avoid the possibility of being ruled non-compliant and/or 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 compliant 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](#).

6.2.3.1. 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. PHASE 1: ADMINISTRATIVE, BIDDER QUALIFICATIONS, BIDDER REFERENCES, AND SOLUTION REQUIREMENTS EVALUATION

All Phase 1 Proposals received by the date and time specified in [SECTION 2.3. KEY ACTION DATES](#) will be evaluated.

Review of Phase 1 Proposals will begin by validating each of the Bidders has provided a response to all requirements specified in [SECTION 3. PROPOSAL REQUIREMENTS](#), which require proposal submission documents.

If the Proposal fails to meet any requirement, the Bidder may be disqualified and may not continue to Phase 2 of the solicitation.

6.3.1. ADMINISTRATIVE REQUIREMENTS EVALUATION

All Administrative Requirements must be received by the date and time specified in [SECTION 2.3. KEY ACTION DATES](#) will be evaluated.

Review of proposals will begin with ensuring that the Bidder has responded to all administrative requirements specified in [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#) that require proposal

submission documents.

All [SECTION 3.2. ADMINISTRATIVE REQUIREMENTS](#) labeled with (M) are mandatory requirements, whereas Administrative Requirements labeled with (O) are optional requirements. 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 REQUIREMENTS EVALUATION

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

Qualification Requirements will be evaluated as a Pass/Fail and, if applicable, points will be awarded. If a proposal fails to meet any mandatory requirement specified in [SECTION 3.3. QUALIFICATION REQUIREMENTS](#) 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 the Bidder's qualifications and experience using the information provided in ATTACHMENT 13: BIDDER QUALIFICATIONS FORM - INSTRUCTIONS, and the ATTACHMENT 14: BIDDER QUALIFICATIONS FORM as specified in [SECTION 3.3.1. BIDDER QUALIFICATIONS \(M\) \(DUE WITH PHASE 1 RESPONSE\)](#).

Descriptions of experience on ATTACHMENT 14: BIDDER QUALIFICATIONS FORM must be clear, concise, and apply directly to the requirements.

To aid the State in evaluating Bidder qualifications, the Bidder should use an 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 01/2020 and 03/2022. The Bidder would only be

credited with twenty-five (25) months of experience.

If a project end date is ongoing or exceeds the solicitation release date, then the Bidder will receive credit for only the experience acquired up to the solicitation release date specified in [SECTION 2.3. KEY ACTION DATES](#). In this instance, Bidders are instructed to use the solicitation release 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 not receive experience credit for the Project. The number of years and months for a project must be indicated on the Bidder Qualification form in order to obtain credit for the experience.

Next, the Evaluation Team will evaluate the completed ATTACHMENT 14: BIDDER QUALIFICATIONS FORM for compliance with instructions specified in ATTACHMENT 13: BIDDER QUALIFICATIONS FORM - INSTRUCTIONS. The State will evaluate all Bidder mandatory qualifications and will award points for desirable qualifications as applicable using the Bidder's response listed in ATTACHMENT 14: BIDDER QUALIFICATIONS FORM.

Reference contacts listed on Bidder Qualification forms may be contacted to verify information and claimed experience. Any conflicting information may result in the proposal being deemed non-responsive and may result in the Bidder being disqualified.

Bidders that fail to submit all required and completed ATTACHMENT 14: BIDDER QUALIFICATIONS FORM together with all required, completed and corresponding ATTACHMENT 15: BIDDER REFERENCE FORM 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 15: BIDDER REFERENCE FORM. The Bidder must submit one (1) ATTACHMENT 15: BIDDER REFERENCE FORM for each project cited, noting that the reference must correspond to each ATTACHMENT 14: BIDDER QUALIFICATIONS FORM. All Bidder Reference forms must be returned with the Phase 1 Proposal submission in order to meet the Bidder reference requirement.

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.

Each Bidder Reference Form must be signed by a reference contact who performed a management or supervisory role on the referenced project. If a reference is not permitted either legally or by company/organization policy to sign the Bidder reference form, the reference must type or print its full name on the form and provide a brief statement outlining the reason they are not permitted to sign the Bidder reference form.

All Bidder Reference Forms must be returned with the proposal response to meet the Bidder mandatory qualification requirements. Proposals that do not include the required Bidder reference forms may be deemed non-responsive and therefore may be disqualified. No more than five (5) projects and five (5) matching Bidder Reference forms are permitted to meet the Bidder qualifications. If the Bidder submits more than five (5) reference forms, only the first five reference forms, in the order presented in the Bidder's response, will be evaluated.

Reference contact individuals must respond using the Rating Scale of Pass or Fail to the qualification/experience questions to indicate whether the stated experience was gained on the reference project. The qualification/experience questions are not scored but will be used to validate claimed experience.

If the reference cannot fill out or sign the form and states the reason why on the form, then that reference form will not be deemed non-responsive.

If the State wishes to validate the claimed information and experience listed on a ATTACHMENT 15: BIDDER REFERENCE FORM, the State may make two (2) attempts via email or phone to the reference contact identified on the ATTACHMENT 15: 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 may be made. If no response is received after the second contact attempt, the State may 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 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](#) may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.3.3.1. FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS EVALUATION

The purpose of EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS is for the Bidder to demonstrate in detail how their solution addresses each requirement. The Bidder must provide complete responses to each (MS) requirement. Answering “U - Unable to meet requirement” or a blank response to any of the mandatory functional and non-functional requirements may result in the proposal being deemed non-responsive. Below is a summary of the response options and definitions that are also in the Exhibit C instructions.

The following provides a description of each column in EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS. Additional column and value descriptions can be found in EXHIBIT C: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS.

Functional:

- Column A: Mid-level requirement category number
- Column B: User Story ID
- Column C-E: Hierarchical traceability of user story to high-level objective
 - Column C - Main Business Capability/Function (L1)
 - Column D - Sub Business Capability/Function (L2)
 - Column E - Requirement (MLR)
- Column F: Detailed requirement (User Story)
- Column G-H: User persona related to user story
 - Column G - User Persona
 - Column H - Persona Group
- Column I: Requirement type
- Column J: Priority
- Column K: Stability
- Column L: Requirement Owner

- Column M-P: Ability of proposed solution to meet requirements (for Contractor response)
 - Column M - Available in System
 - Column N - Level of Effort
 - Column O - Third Party Software
 - Column P - Comments
- Column Q: Requirement Score (State-Use Only)

Non-Functional:

- Column A: Category Name
- Column B: Requirement Number
- Column C: Requirement Description
- Column D: Acceptance Criteria
- Column E: Requirement type
- Column F: Priority
- Column G: Stability
- Column H: Requirement Owner
- Column I-L: Ability of proposed solution to meet requirements (for Contractor response)
 - Column I - Available in System
 - Column J - Level of Effort
 - Column K - Third Party Software
 - Column L - Comments
- Column M: Requirement Score (State-Use Only)

The Bidder's ability to meet the requirements is categorized as follows:

- B - Out of the Box (OOTB): The requirement can be met in its baseline form that is native to the solution and available immediately without customization, modification, configuration, additional software, third party tools, or processes of any kind. Requirement is met "Out of the Box."
- C - Update to code. The code must be modified to meet the requirement.
 - L (0–40 hours) = Low LOE. 0–40 hours required to make necessary customizations (e.g. minor to moderate code changes, addition of new attributes and related GUI updates) **For this value, a narrative response within the "Comment" column is required.** The response shall include the type of work required for the customization work itself and a rough order of magnitude (ROM) estimate of effort (do not include design, testing, or other effort beyond the customization work).

- H (41+ hours) = High LOE. 41+ hours required to make necessary customizations (e.g. code changes in multiple modules, addition of a function that impacts solution architecture) **For this value, a narrative response within the "Comment" column is required.** The response shall include the type of work required for the customization work itself and a rough order of magnitude (ROM) estimate of effort (do not include design, testing, or other effort beyond the customization work).
- T - Third-party software integration required. The requirement can be met with the integration of third-party software. **For this value, a narrative response within the "Comment" column is required.** Name the application/tool and indicate why it is not included in the proposed solution. An example might be an Integrated Development Environment already broadly available at SWRCB and not requiring additional licensing.
- U - Unable to meet the requirement. The requirement cannot be met by the proposed Solution. **For this value, a narrative response within the "Comment" column is required.**
- If no response is indicated, the State will assume the Solution is unable to meet the requirement.

Scoring of MS Requirement Responses

The Evaluation Team will evaluate and award points for all mandatory scored requirements using the following criteria:

- If the Bidder indicates they are able to meet any requirement with a B-Out of the Box, the requirement will receive five (5) points.
- If the Bidder indicates they are able to meet any requirement with a C-Customization, the requirement will receive points as follows:
 - Low level of effort — L (0–40 hrs) — 3.5 points
 - High level of effort — H (41+ hrs) — 2 points
 - *NOTE: 2 points will be awarded where LOE is not indicated in column N*
- If the Bidder indicates they are able to meet any requirement with T-Third-Party Software Integration (with Comment), the requirement will receive one (1) point.
- If the Bidder indicates they are unable to meet any requirement with U-Unable to meet, the requirement will receive zero (0) points.

6.3.3.2. DELIVERABLES AND MILESTONES EVALUATION

The Bidder must complete and submit EXHIBIT D: DELIVERABLES AND MILESTONES TABLE. 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 response to each deliverable listed in EXHIBIT D: DELIVERABLES AND MILESTONES TABLE to confirm compliance.

If the Bidder responds with a "No" response to any deliverable or does not return the completed Deliverables and Milestones Table with their Phase 1 Proposal, it 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.

6.4. PHASE 2: KEY STAFF QUALIFICATIONS, KEY STAFF REFERENCES, PHASE 2 NARRATIVE RESPONSES, AND COST EVALUATION

All Phase 2 Proposals received by the date and time specified in [SECTION 2.3. KEY ACTION DATES](#) will be evaluated.

Review of Phase 2 Proposals will begin by validating each of the Bidders has provided a response to all requirements specified in [SECTION 3. PROPOSAL REQUIREMENTS](#), which require proposal submission documents.

If the Proposal fails to meet any requirement, the Bidder may be disqualified and may not continue to Phase 3 of the solicitation.

6.4.1. QUALIFICATION REQUIREMENTS EVALUATION

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

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

6.4.1.1. KEY STAFF QUALIFICATIONS EVALUATION

The State will evaluate each Key Staff member's qualifications and experience using the information

provided in the ATTACHMENT 16: KEY STAFF QUALIFICATIONS FORM - INSTRUCTIONS as specified in [SECTION 3.3.3. KEY STAFF QUALIFICATIONS \(M/DS\) \(DUE WITH PHASE 2 RESPONSE\)](#).

Descriptions of experience on the KEY STAFF QUALIFICATION FORMS must be clear, concise, and apply directly to the requirements.

To aid the State in evaluating Key Staff member qualifications, the Bidder should use an 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 01/2020 and 03/2022. The Bidder would only be credited with twenty-five (25) months of experience.

All Key Staff experience cited must have occurred within twelve (12) years prior to the solicitation release date for all projects and must have been completed in the United States of America. If a project end date is ongoing or exceeds the solicitation release date, then the Key Staff member will receive credit for only the experience acquired up to the solicitation release date specified in [SECTION 2.3. KEY ACTION DATES](#). In this instance, Bidders are instructed to use the solicitation release date as the end date of ongoing projects. Concurrent project timeframes (overlapping dates) will only count once for calculating the number of years and months of qualification experience for each Key Staff member.

No more than five (5) projects and five (5) matching Key Staff Reference forms are permitted to meet each Key Staff member's qualifications.

If the number of years and months for a project was not indicated on the KEY STAFF QUALIFICATION FORM "Experience gained on this cited Project" and the Bidder checked "yes" to meet the total experience on the project cited, then the Key Staff member will not receive experience credit for the Project. The number of years and months for a project must be indicated on the Key Staff Qualification form in order to obtain credit for the experience.

Next, the Evaluation Team will evaluate the completed KEY STAFF QUALIFICATION FORMS for compliance with the instructions specified in ATTACHMENT 16: KEY STAFF QUALIFICATIONS FORM - INSTRUCTIONS. The State will evaluate the Key Staff mandatory qualifications and will award points for desirable qualifications as applicable using the Bidder's response to each Key Staff member's desirable qualifications as applicable using the Bidder's response listed in the following attachments:

- ATTACHMENT 16.1: ENGAGEMENT DIRECTOR QUALIFICATIONS FORM
- ATTACHMENT 16.2: PROJECT MANAGER QUALIFICATIONS FORM
- ATTACHMENT 16.3: SENIOR DATA ARCHITECT QUALIFICATIONS FORM

- ATTACHMENT 16.4: SENIOR SOFTWARE SOLUTIONS ARCHITECT QUALIFICATIONS FORM
- ATTACHMENT 16.5: SENIOR BUSINESS ANALYST QUALIFICATIONS FORM
- ATTACHMENT 16.6: TRAINING LEAD QUALIFICATIONS FORM
- ATTACHMENT 16.7: SENIOR TEST AND VALIDATION LEAD QUALIFICATIONS FORM
- ATTACHMENT 16.8: TECHNICAL LEAD QUALIFICATIONS FORM
- ATTACHMENT 16.9: ORGANIZATIONAL CHANGE MANAGEMENT LEAD QUALIFICATIONS FORM
- ATTACHMENT 16.10: GIS SOLUTION EXPERT QUALIFICATIONS FORM

If the State is unable to validate the information supplied for any Key Staff qualification, said Bidder is disqualified from being awarded desirable scored (DS) qualification points, no points will be awarded for such experience. Any desirable scored experience points awarded will be added to the Key Staff member's qualification score. Reference contacts listed on KEY STAFF QUALIFICATION FORMS may be contacted to verify information and claimed experience. Any conflicting information may result in the proposal being deemed non-responsive and may result in the Bidder being disqualified.

Bidders that fail to submit all required and completed KEY STAFF QUALIFICATION FORMS together with all required, completed and corresponding ATTACHMENT 17: KEY STAFF REFERENCE FORM may be considered non-responsive and may be the basis for rejecting the Bidder's proposal.

6.4.1.2. KEY STAFF REFERENCES EVALUATION

The State will evaluate the Key Staff member's references using the information provided in each ATTACHMENT 17: KEY STAFF REFERENCE FORM. The Bidder must submit one (1) ATTACHMENT 17: KEY STAFF REFERENCE FORM for each project cited for each Key Staff member, noting that the reference must correspond to each ATTACHMENT 16: KEY STAFF QUALIFICATIONS FORM. All Key Staff member Reference forms must be returned with the Phase 2 Proposal submission in order to meet the Key Staff member reference requirement.

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.

Each Key Staff Reference Form must be completed by a reference contact who performed a management or supervisory role on the referenced project. If a reference is not permitted either legally or by company/organization policy to sign the Key Staff reference form, the reference must type or print its full name on the form and provide a brief statement outlining the reason they are not permitted to sign the Key Staff reference form.

All Key Staff Reference Forms must be returned with the proposal response to meet the Key Staff mandatory qualification requirements. Proposals that do not include the required Key Staff reference forms may be deemed non-responsive and therefore may be disqualified. No more than five (5) projects and five (5) matching Key Staff Reference forms are permitted to meet each Key Staff member's qualifications. If the Bidder submits more than five (5) reference forms, only the first five reference forms, in the order presented in the Bidder's response, will be evaluated for each of the Key Staff.

Reference contact individuals must respond using the Rating Scale of Pass or Fail to the qualification/experience questions to indicate whether the stated experience was gained on the reference project. The qualification/experience questions are not scored but will be used to validate claimed experience. Any rating of "Fail" will result in failure to meet the Key Staff Reference requirement.

If a reference cannot fill out or sign the form and states the reason why on the form, then that reference form will not be deemed non-responsive.

If the State wishes to validate the claimed information and experience listed on a Key Staff Reference Form, the State will make two (2) attempts to contact the reference contact identified on the Key Staff Reference Form to validate the claimed information and experience via email or phone. The Bidder should ensure that its Key Staff 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.

6.4.2. SOLUTION REQUIREMENTS EVALUATION

All Solution Requirements are Mandatory Scored and labeled with (MS) are mandatory. Review of the Phase 1 Proposals will begin with ensuring that the Bidder has responded to all mandatory scored Solution Requirements.

Solution Requirements will be evaluated as Mandatory Scored (MS) and points will be awarded. If a

Phase 1 Proposal fails to meet any mandatory requirement specified in [SECTION 3.4. SOLUTION REQUIREMENTS](#), the Phase 1 Proposal may be considered non-responsive and may be the basis for rejecting the Bidder's Phase 1 Proposal.

6.4.2.1. PHASE 2 NARRATIVE RESPONSES EVALUATION

The Bidder's Narrative Responses must be submitted in the format specified in [SECTION 3.4.3. NARRATIVE REQUIREMENTS \(MS\) \(DUE WITH PHASE 2 RESPONSE\)](#), and ATTACHMENT 18: PHASE 2: NARRATIVE RESPONSE REQUIREMENTS. The Evaluation Team will evaluate the Bidder's response to Phase 2 Narrative Responses to confirm compliance and will be scored for responsiveness and completeness using the scoring criteria shown in Table 6.2: Narrative Scoring Criteria, above.

Points will be awarded for the Phase 2 Narrative Responses as detailed in [SECTION 6.2. PROPOSAL EVALUATION](#), Table 6-1: Scoring and Point Distribution. Points will be awarded only at a percentage of the total possible points for each narrative response.

6.4.3. COST EVALUATION

The Bidder's EXHIBIT E: COST WORKBOOK will be submitted by the Phase 2 Proposal due date and time specified in [SECTION 2.3. KEY ACTION DATES](#) will be evaluated.

The total Cost points of five thousand three hundred (5,300) are weighted at thirty percent (30%) of the maximum available points (17,670) for this solicitation.

After [SECTION 3. PROPOSAL REQUIREMENTS](#) have been evaluated, the State Evaluation Team will evaluate EXHIBIT E: COST WORKBOOK (Bidder's Phase 2 Proposal response to Phase 2: Cost) for those Bidders whose Phase 2 Proposals have been deemed responsive. If a Bidder is determined to be non-responsive, its EXHIBIT E: COST WORKBOOK will remain unopened.

The intent is to structure the pricing format to facilitate a straightforward comparison among all Cost responses and foster competition to obtain the best market pricing. Consequently, SWRCB 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 EXHIBIT E: COST WORKBOOK, or those that are identified after the Contract Award as necessary to meet the requirements of this solicitation, will

be at no additional cost to the State.

If the Bidder's Cost information fails to meet the requirement to be submitted under separate cover, the State may immediately deem the Phase 2 Proposal non-responsive and may discontinue evaluation of the Phase 2 Proposal. Proposed costs for all line items must be all-inclusive, thereby including the cost of any and all associated services required in this solicitation to implement and maintain the full solution through the term of the Contract. 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, SWRCB 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 requested, may result in the rejection of Bidder's proposal.

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

Eligible Bidders will have their Cost Workbook evaluated. The Evaluation Team will evaluate the Bidder's cost information and award a maximum of five thousand three hundred (5,300) points as shown in [SECTION 6.4.3.1. COST SCORE CALCULATION](#).

If a proposal fails to meet any mandatory requirements specified in [SECTION 4.3. COST WORKBOOK \(MS/MO\) \(DUE WITH PHASE 2 RESPONSE\)](#) or in this [SECTION 6.4.3. COST EVALUATION](#), it will be considered a deviation in accordance with [SECTION 2.4.1. IDENTIFICATION AND CLASSIFICATION OF SOLICITATION REQUIREMENTS](#).

6.4.3.1. 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 6.2.3. ERRORS IN THE PROPOSAL](#). After Cost Worksheets have been verified for accuracy, the Bidder with the lowest proposed Total Cost will receive the maximum score of five thousand three hundred (5,300) points. All other Bidders will receive a proportionally lower score using the ratio of the lowest proposed Total Cost to the Bidder's proposed Total Cost applied to the maximum points, as shown in Table 6-5 below:

Table 6-5: Bidder Total Cost Score Formula

(Lowest Proposed Total Cost)	X	5,300 points =	Bidder Total Cost Score
(Bidder's Proposed Total Cost)			

The total cost score calculation in Table 6-6: Bidder Total Cost Score Calculation, illustrates that Bidder C proposed the lowest total cost and received the maximum points possible.

Table 6-6: Bidder Total Cost Score Calculation

BIDDER	BIDDER'S TOTAL COST	CALCULATION				BIDDER'S TOTAL COST SCORE
A	\$500,000	(\$300,000 / \$500,000)	X	5,300 points	=	3,180 points
B	\$400,000	(\$300,000 / \$400,000)	X	5,300 points	=	3,975 points
C	\$300,000	(\$300,000 / \$300,000)	X	5,300 points	=	5,300 points

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

6.4.3.2. 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) and/or incentive(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 and/or incentive points will be applied to the Bidder's final overall proposal score as illustrated in [SECTION 6.4.5. PROPOSAL RANK DETERMINATION](#) provided that the Bidder's proposal is not otherwise determined to be non-responsive to any mandatory requirements.

6.4.3.2.1. DVBE INCENTIVE (O) EVALUATION

In accordance with §999.5(a) of the Military and Veterans Code, for evaluation purposes only, the State shall provide an incentive to Bidders who provide California-certified DVBE participation that exceeds the

mandatory California-certified DVBE participation goal in the amounts shown in Table 6-7 DVBE 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 6-7 below is an illustration of this calculation:

Table 6-7: DVBE Incentive Formula

CONFIRMED DVBE PARTICIPATION	DVBE INCENTIVE PERCENTAGE	DVBE INCENTIVE POINTS
≥ 5.0%	5%	350.00 (7,000 Max Total Points x .05)
4.0% - 4.99%	4%	280.00 (7,000 Max Total Points x .04)
3.1% - 3.99%	3%	210.00 (7,000 Max Total Points x .03)
<3%	0%	0.00

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

6.4.3.2.2. SMALL BUSINESS PREFERENCE (O) EVALUATION

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

In accordance with Government Code §14835 et seq., Bidders who qualify as a small business/micro 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 or micro 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/micro business preference is also available to a non-small business claiming twenty-five percent (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 twenty-five percent (25%) to a small business or micro business. Non-small business Bidders claiming the five percent (5%) small business preference must commit to subcontract at least twenty-five percent (25%) of the net proposal price with one (1) or more California certified small or micro 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 Phase 1 Proposal due date, and the OSDS must be able to approve the application as submitted. Questions regarding certification should be directed to the OSDS at (916) 375-4940.

For an illustration of this process, refer to the example in Table 6-8, 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 $(7,000 \text{ points}) \times (.05) = 350.00 \text{ points}$. Bidder C, which is neither a small business nor a non-small business subcontracting a minimum of twenty-five percent (25%) to a small business, receives no small business preference points.

Table 6-8: Small Business Preference Points Calculation

BIDDER	BIDDER TOTAL PROPOSAL SCORE	SMALL BUSINESS PREFERENCE CLAIM?	NON-SMALL BUSINESS PREFERENCE CLAIM?	SMALL BUSINESS PREFERENCE POINTS AWARDED
A	3,800.00 points	Yes	No	350.00 points
B	5,225.00 points	No	Yes	350.00 points
C	7,000.00 points	No	No	0.00 points

NOTE: Calculation is based on five percent (5%) of the Bidder with the highest “Bidder Proposal Score” that is a non-small business. Point values and costs in this example explain the calculations and have no other significance.

6.4.3.2.3. TACPA PREFERENCE (O) EVALUATION

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

Available evaluation preferences under TACPA are limited to nine percent (9%), five percent (5%) worksite, and one percent (1%) up to four percent (4%) workforce of the lowest total proposal price or fifty thousand dollars (\$50,000), whichever is less. The TACPA preference is a dollar preference, applied against the Bidder's proposed cost, before cost is evaluated and converted to points.

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

6.4.4. BIDDER FINAL SCORE CALCULATION

The Evaluation Team will calculate the Bidder's final score. Table 6-9, Bidder Final Score Calculation, illustrates the Bidder's final score, which incorporates both preference and incentive points:

Table 6-9: Bidder Final Score Calculation

BIDDER	BIDDER TOTAL PROPOSAL SCORE	SMALL BUSINESS PREFERENCE POINTS AWARDED	VERIFIED DVBE %	DVBE INCENTIVE POINTS AWARDED	BIDDER FINAL SCORE
A	3,800.00 points	290.00 points	3%	210.00 points	4,300.00 points
B	5,225.00 points	290.00 points	4%	280.00 points	5,795.00 points
C	7,000.00 points	0.00 points	5%	350.00 points	7,350.00 points

NOTE: Bidder's final score calculation in Table 6-9 is an example that explains the calculations and has

no other significance.

6.4.5. PROPOSAL RANK DETERMINATION

The State will determine which Bidder has the highest combined score for the proposal requirements and cost, up to the maximum points, plus any preference and/or incentive points. The State will rank all qualified proposals by the Bidder's final score. Table 6-10 demonstrates how the final ranking determination is made.

Table 6-10: Example of Final Score and Rank Determination

Requirements	Max Points	Bidder A	Bidder B	Bidder C
Review of Proposals for Administrative Compliance				
Opening and Submission Validation	Pass/Fail	Pass	Pass	Pass
Administrative and Technical Review for Compliance	Pass/Fail	Pass	Pass	Pass
Phase 1 - Non-Cost				
Bidder Qualifications — Mandatory	Pass/Fail	Pass	Pass	Pass
Bidder References	Pass/Fail	Pass	Pass	Pass
Deliverables and Milestones Table	Pass/Fail	Pass	Pass	Pass
Functional & Non-Functional Requirements	6,185.00	6,000.00	5,400.00	4,500.00
Total Phase 1 Score	6,185.00	6,000.00	5,400.00	4,500.00
Phase 2 - Non-Cost				
Key Staff Qualifications — Mandatory	Pass/Fail	Pass	Pass	Pass
Key Staff Qualifications — Desirable	3,150.00	2,000.00	1,800.00	600.00

Key Staff — Reference Forms	Pass/Fail	Pass	Pass	Pass
Phase 2 Narratives	3,035.00	3,000.00	2,500.00	2,700.00
Total Phase 2 Non-Cost Score	6,185.00	5,000.00	4,300.00	3,300.00
Total Non-Cost Score (Phase 1 and 2)	12,370.00	11,000.00	9,700.00	7,800.00
Phase 2 - Cost				
Cost Score	5,300.00	5,200.00	3,624.00	5,300.00
Total Score (Phase 1, Phase 2 and Cost)	17,670.00	16,200.00	13,324.00	13,100.00
Initial Rank (Before preferences and incentives)		1	2	3
DVBE Participation Claimed	Yes/No	Yes - 5.0%	No	No
DVBE Incentive Points	883.50	883.50	0.00	0.00
Small Business Claimed	Yes/No	Yes	No	No
Small Business Preference Points	666.20	666.20	0.00	0.00
Bidder Final Score	19,219.70	17,749.70	13,324.00	13,100.00
Final Rank		1	2	3

NOTE: The Bidder's Final Score calculation and point values in this example explain the calculations and have no other significance.

7. PHASE 3: 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 are 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 a 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.

The 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 Phase 2 Bidders will be determined as eligible to participate in the negotiation process.

NOTE: In the event no responsive proposals are received, the State, at its discretion, may proceed to negotiations with all Phase 2 Bidders that submitted a proposal.

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 eighty (180) calendar days** following the scheduled date for submission of a final accepted BAFO 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.

7.5. ADDITIONAL DOCUMENTS REQUIRED FOR AWARD

The State reserves the right to require additional documentation as may be necessary to complete the award of its Contract. Such additional documentation is beyond those listed under [SECTION 5. PROPOSAL FORMAT AND SUBMISSION REQUIREMENTS](#), shall be determined by the State. Such additional required documents are not intended to impose new requirements upon the Bidder and shall not be refused by the Bidder.

Additional required documents must be submitted to the Procurement Officer no later than ten (10) State Business Days from the State's posting of its Notification of Award. These documents are required by the State in order to assemble the awarded Agreement.

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

Notification of Award.

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

9. DEBRIEFING

A debriefing may be held within fifteen (15) days following Contract award at the request of any Bidder for the purpose of receiving specific information concerning the evaluation. The discussion will be based primarily on the qualifications, solution requirements and cost evaluations of the Bidder's proposal. A debriefing is not the forum to challenge the solicitation specifications or requirements. 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.