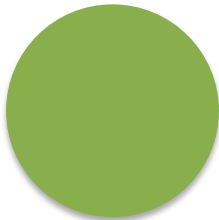


CalSAWS |

Bidder's Conference

BenefitsCal M&O Procurement – RFP #01-2024



June 11, 2024



# Welcome, Housekeeping and Introductions

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# CalSAWS BenefitsCal M&O Bidder's Conference

## Welcome and Introductions

- Welcome
- Speaker Introductions
- Housekeeping
  - No video or audio recording is permitted, and no transcripts or minutes will be produced.
  - In-person attendance must be logged on the sign-in sheet.
  - No food or drink except water.
  - Facilities and emergency exits.
  - Please silence your cell phones.
  - At the conclusion of the presentation, prospective Bidders may ask questions regarding the RFP.
  - Tap the base of the tabletop microphone to activate before speaking
  - Vendors may access a copy of this presentation via [CalSAWS.org/procurement-listings/](https://CalSAWS.org/procurement-listings/)



# Bidder's Conference Purpose

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# CalSAWS BenefitsCal M&O Bidder's Conference

## Purpose

- This is an opportunity for the Consortium to share information with the vendor community and answer vendor questions related to the RFP.
- Oral statements and responses are non-binding and subject to change.
- All official information is provided through the processes documented in the RFP.
  - Procurement Manager – Tom Hartman, CalSAWS Common Services Director.
  - Official procurement email address:  
[ProcurementTeam@CalSAWS.org](mailto:ProcurementTeam@CalSAWS.org)
- For BenefitsCal Procurement Library access, contact Dan Brown, OTSI, for credentials:  
[Daniel.Brown@otsi.ca.gov](mailto:Daniel.Brown@otsi.ca.gov)



# Agenda Review



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# Agenda

- ① Welcome – Tom Hartman
- ② Bidder's Conference Purpose – Tom Hartman
- ③ Agenda Review – Tom Hartman
- ④ Consortium and Governance Overview – Tom Hartman
- ⑤ BenefitsCal Future Vision – CalSAWS Section Directors: Tom Hartman, Lynn Bridwell and Laura Chavez
- ⑥ Procurement Overview and Scope – Tom Hartman
- ⑦ Proposal Content and Submission – Dave Sodergren
- ⑧ Proposal Evaluation – Betty Uzupis
- ⑨ RFP Q&As – Betty Uzupis
- ⑩ Question and Answer Period – Tom Hartman
- ⑪ Next Steps – Tom Hartman



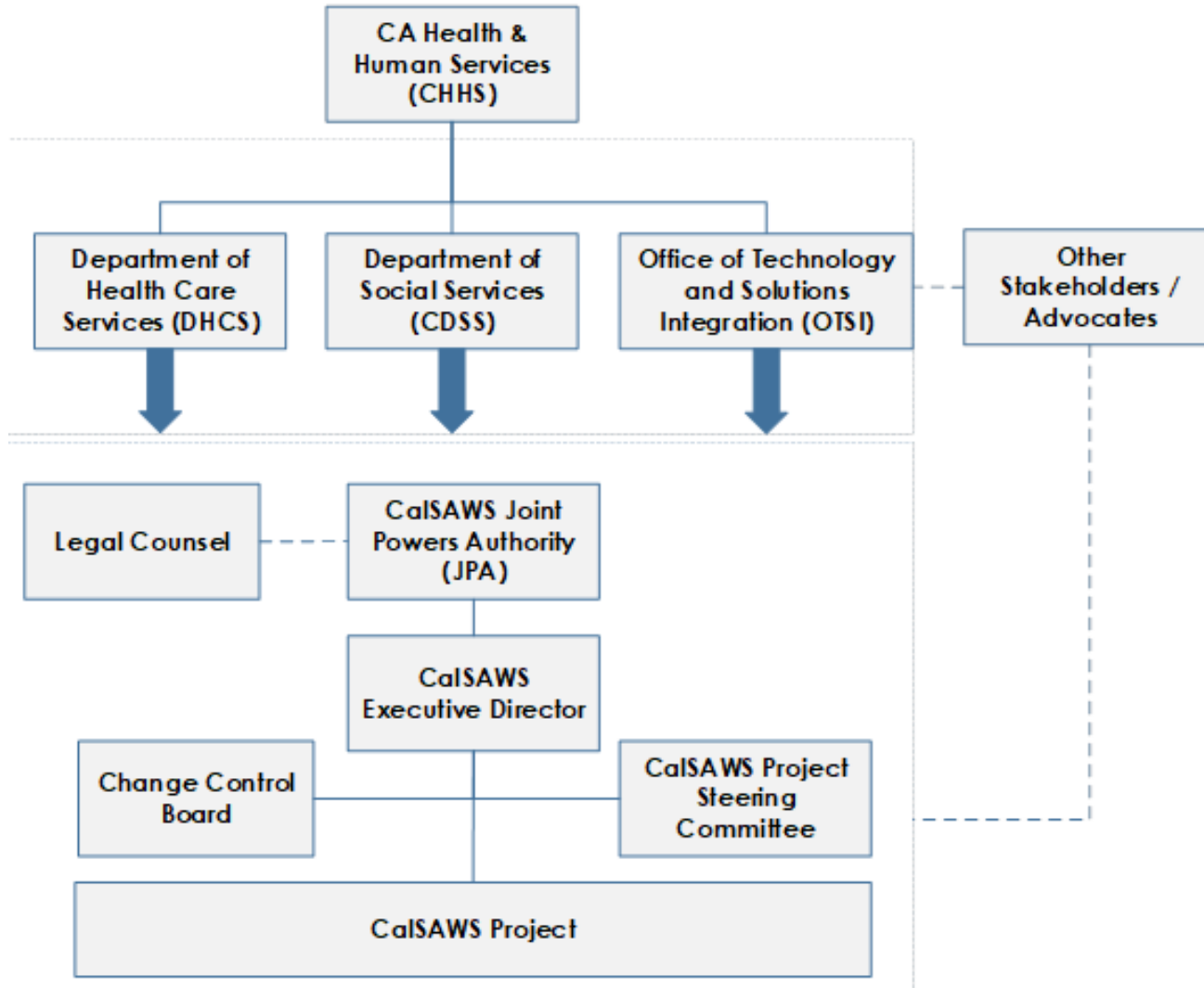
# CalSAWS Consortium Overview

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# CalSAWS BenefitsCal M&O Bidder's Conference

## CalSAWS Consortium Overview – Governance

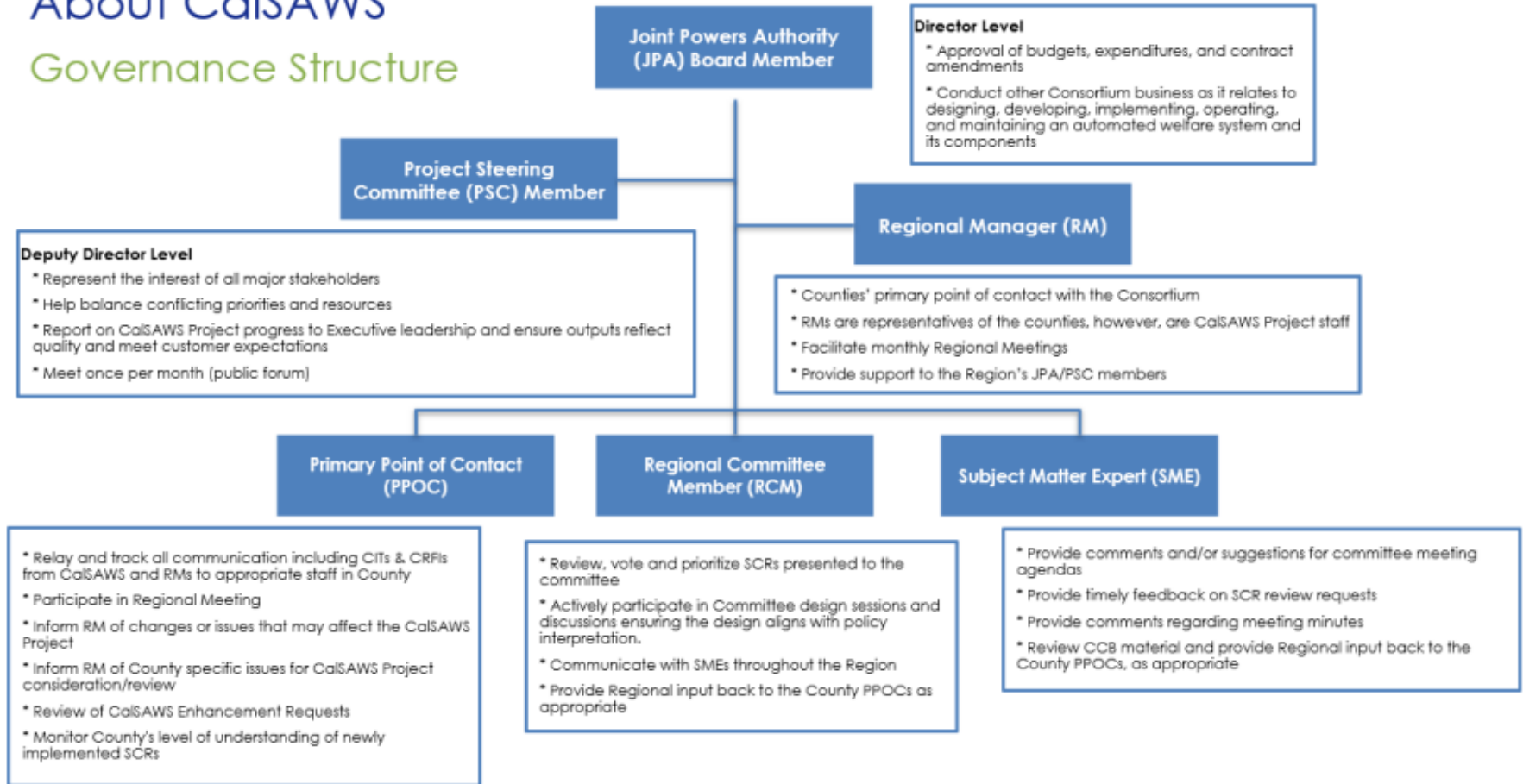


# CalSAWS BenefitsCal M&O Bidder's Conference

## CalSAWS Consortium Overview – Governance

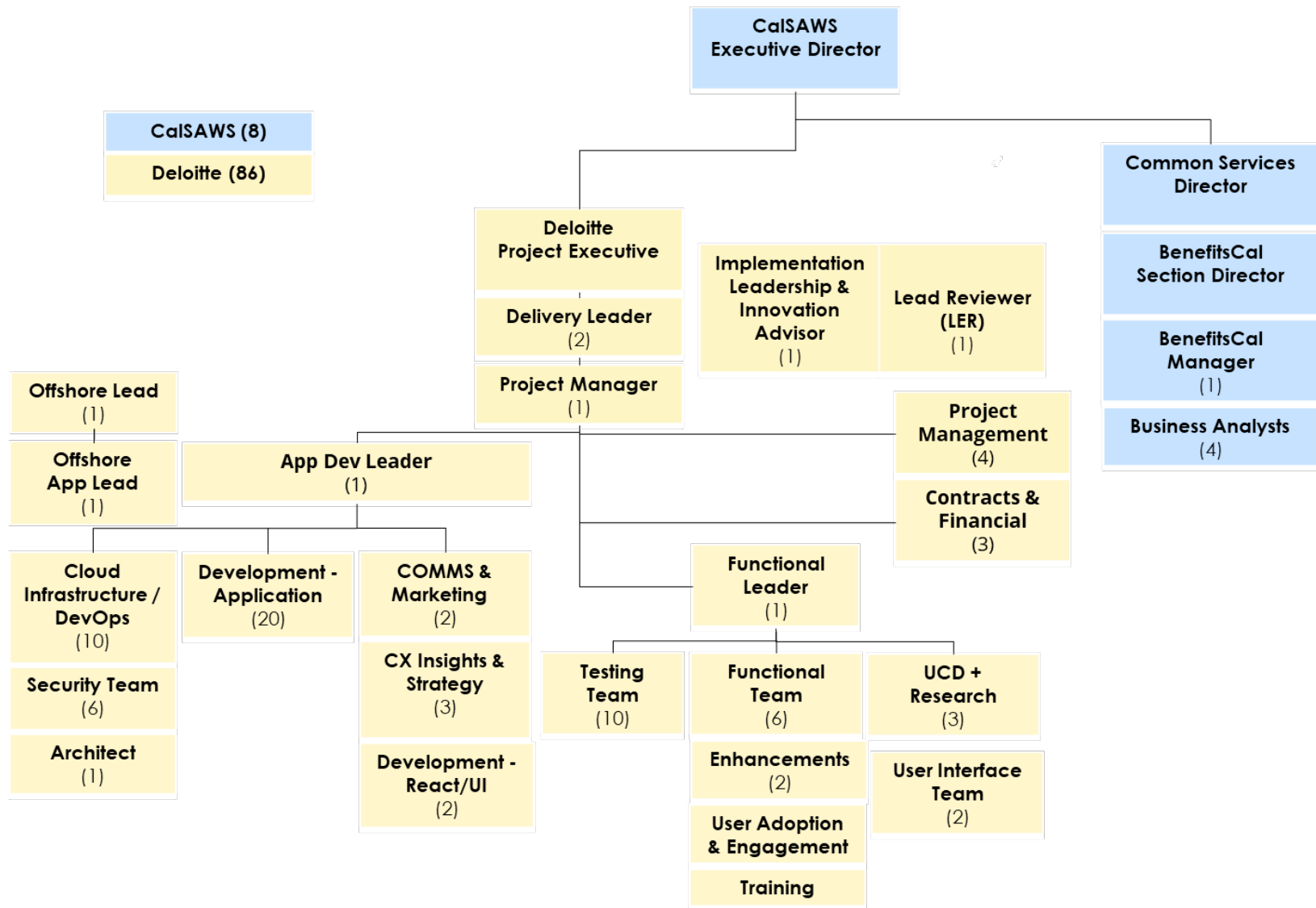
### About CalSAWS

### Governance Structure



# CalSAWS BenefitsCal M&O Bidder's Conference

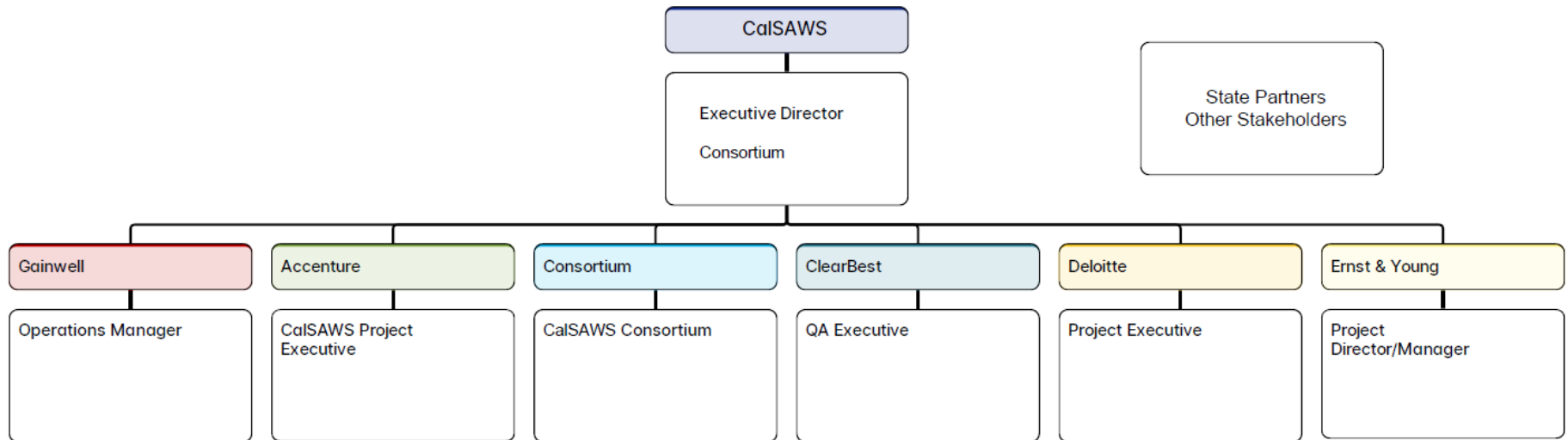
## CalSAWS Consortium Overview – BenefitsCal Team



# CalSAWS BenefitsCal M&O Bidder's Conference

## CalSAWS Consortium Overview – Multi-Contractor Organization

- The Consortium operates the CalSAWS System in a multi-vendor environment today, including the operation of the BenefitsCal System.
- The Consortium and Contractor teams work cooperatively on all aspects of the CalSAWS System, including public-facing involvement and communications, as well as ongoing application and BenefitsCal development, testing, deployment and maintenance.





# BenefitsCal Future Vision



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# CalSAWS BenefitsCal M&O Bidder's Conference

## BenefitsCal Future Vision

Tom Hartman - Common Services Section Director

### ■ Key Tenets of the Vision:

- Fully integrate with the CalSAWS ecosystem and adhere to established processes including Portfolio Management Office (PMO), Delivery Integration (DI) and System Change Requests (SCRs).
- Continue to enhance the Collaboration Model and stakeholder engagement and communication processes.
- Expand and further refine User Centered Design (UCD) and the User Experience (UX) within the software development process.
- Enhance communications and marketing to increase visibility and outreach for the public, Counties and Community Based Organizations (CBOs).
- Application/architecture evolution and innovation including expanding data analytics capabilities to provide evidence-based outcomes.
- Continuous evolution of infrastructure and application security to reinforce robust cybersecurity measures.



# CalSAWS BenefitsCal M&O Bidder's Conference

## BenefitsCal Future Vision

Lynn Bridwell - BenefitsCal Section Director

- Collaboration Model Overview:
  - Partners and Input Channels
  - Stakeholder Meetings
  - Ongoing Expectations for Refinements
- Focus on User Centered Design and the User Experience to:
  - Elicit Maximum Understanding of User Needs.
  - Continue to apply UCD fundamentals and identify and determine areas within BenefitsCal that could be restructured to improve the overall User Experience and ultimate delivery of services to those in need.
- Improve Marketing and Public Communications Outreach to:
  - Increase Awareness and Adoption.
  - Enhance Communication and Marketing Programs to ensure Stakeholder and Consortium priorities are reflected.
  - Enhance and expand education and coaching for the public.
  - Increase Stakeholder inclusion and Involvement in the UCD process and User Experience testing methods.



# CalSAWS BenefitsCal M&O Bidder's Conference

## BenefitsCal Future Vision

Laura Chavez - Technical and Operations Section Director

- Multi-Contractor Collaboration and Coordination
- Application and Architecture Evolution: Optimizing the application and architecture to take advantage of cloud innovations, features and Services
- Ongoing Innovation
- Enhanced Data Analytics capabilities to provide evidence-based outcomes and make informed decisions to improve those outcomes.
- Expand data mining, reporting and usage monitoring capabilities and apply results as usability improvements
- Protecting BenefitsCal: Security Standards and Best Practices







# Procurement Overview and Scope

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# CalSAWS BenefitsCal M&O Bidder's Conference

## Procurement Overview – Procurement Scope

- M&O of the BenefitsCal application and infrastructure
- SCR-driven application changes (2,500 hours per month)
- Operations including management, Level 3 Service Desk, security and continuous improvement (1,500 hours per month)
- AWS Cloud Infrastructure (965 hours per month)
- Ongoing language translations
- Manage and maintain Software required for BenefitsCal operations
- Bidders will formally attest to the acceptance of all requirements
- Bidders will formally respond to the RFP Understanding and Approach requirements

# CalSAWS BenefitsCal M&O Bidder's Conference

## Procurement Overview – Procurement Scope

- Out of Scope
  - No Hardware or Networks
  - No Facilities
  - No new application functionality except through the SCR process

# CalSAWS BenefitsCal M&O Bidder's Conference

## Procurement Overview – Contract Term

### ■ Contract Term

- Aligned with the end of new CalSAWS M&E Base Contract Term + Extensions.
- Six-month Transition-In period: September 2, 2025 – February 28, 2026.
- Base Contract: March 1, 2026 – July 2031 (5 years + 5 months).
- Extensions (up to 4 years): August 2031 – July 2035.
- Total Contract Term if all extensions are exercised: 9 years + 11 months.

# BenefitsCal RFP Walkthrough

## Section 5 – Bidder Requirements: Requirements Matrix

- Requirements are organized into nine task areas:
  1. Transition-In – 29 requirements
  2. Management – 35 requirements
  3. System Change Requests – 71 requirements
  4. Support Services – 11 requirements
  5. Enhancement and Innovation – 15 requirements
  6. Production Operations – 46 requirements
  7. Technology Recovery – 12 requirements
  8. Security Requirements – 61 requirements
  9. Transition-Out – 36 requirements
- Total Requirements: 316

# CalSAWS BenefitsCal M&O Bidder's Conference

## Attachment 3 – Deliverables Inventory

1. \*Transition-In Master Plan
2. Services Plan and Operational Working Documents
3. \*Transition-In Work Schedule
4. \*Transition-In Test and Validation Plan
5. Project Control Document
6. \*Work Schedule
7. User Centered Design Plan and Customer Experience Report Plan
8. Requirements Traceability Matrix (RTM) and Report
9. General Design Document (GDD)
10. Performance Test Materials Packet
11. Certification of Successful Production Release
12. \*Marketing and Public Communications Plan
13. \*Approach to Automation, Artificial Intelligence and Machine Learning
14. Monthly Service Level Agreement Performance Report
15. Technology Recovery Plan
16. System Security Plan
17. \*Transition-Out Master Plan
18. \*Transition-Out Work Schedule
19. \*Agreement Closeout Plan
20. \*Final Project Closeout Report

*\*Indicates a new deliverable*

# CalSAWS BenefitsCal M&O Bidder's Conference

## Procurement Overview – Key Tasks

	BenefitsCal Procurement Event	Dates
1	Release RFP	May 29, 2024
2	Conduct Bidder's Conference	June 11, 2024
3	Bidder Question Period	May 30 – June 18, 2024
4	Consortium Responds on a Flow Basis	June 6 – 26, 2024
5	Consortium Publishes Final Q&A and RFP Addendum	July 3, 2024
6	Bidders Submit Request to OTSI for Proposal Folder	July 15, 2024
7	Proposals Due	July 30, 2024
8	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	July 31, 2024 – February 5, 2025
9	Prepare and Approve Vendor Selection Report	February 6 – March 18, 2025
10	Publish Notice of Intent to Award and VSR	March 19, 2025
11	Contract Negotiations	March 24 – April 3, 2025
12	State Contract Approval	April 4 – May 8, 2025
13	Federal Contract Approval	May 9 – July 14, 2025
14	Contingency Period	July 15 – August 18, 2025
15	JPA BOD Approval	August 22, 2025
16	Contract Start	September 2, 2025
17	Transition-In Period	September 2, 2025 – February 27, 2026



# Proposal Content

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# CalSAWS M&O Bidder's Conference

## Proposal Organization and Content

### Volume 1 Business Proposal

#### PROPOSAL VOLUME CONTENTS

##### VOLUME 1 - BUSINESS PROPOSAL

1. Cover Page
2. Transmittal Letter
3. Table of Contents
4. Section 1 Executive Summary
5. Section 2 Firm Qualifications
6. Section 3 Staffing Approach
7. Section 4 Understanding and Approach
8. Section 5 Required Attachments

### Volume 3A & 3B Business & Price Proposals – Redacted

#### PROPOSAL VOLUME CONTENTS

##### VOLUME 3A - BUSINESS PROPOSAL WITH CONFIDENTIAL OR PROPRIETARY PORTIONS REDACTED - OPTIONAL

1. Justification to Redact Letter
2. Cover Page
3. Transmittal Letter
4. Table of Contents
5. Section 1 Executive Summary
6. Section 2 Firm Qualifications
7. Section 3 Staffing Approach
8. Section 4 Understanding and Approach
9. Section 5 Required Attachments

### Volume 2 Price Proposal

#### PROPOSAL VOLUME CONTENTS

##### VOLUME 2 - PRICE PROPOSAL

1. Cover Page
2. Price Proposal Schedules

#### PROPOSAL VOLUME CONTENTS

##### VOLUME 3B - PRICE PROPOSAL WITH CONFIDENTIAL OR PROPRIETARY PORTIONS REDACTED - OPTIONAL

1. Justification to Redact Letter
2. Cover Page
3. Price Proposal Schedules

- Please note: if a Bidder does not submit Volumes 3A and/or 3B, their proposal will be posted to CalSAWS.org as submitted (unredacted).

# CalSAWS BenefitsCal M&O Bidder's Conference

## Proposal Content – Required Attachments

- Volume 1 - Business Proposal

Section 5 Required Attachments		
Attachment	Source	Notes
Attachment 4 – Statement of Compliance with Requirements	Embedded in RFP	Requires Signature
Attachment 7 – Exceptions to the Agreement	Embedded in RFP	Requires Signature
Attachment 8 – Firm Mandatory Qualifications	Separate Excel File	
Attachment 9 – Firm References (2 Separate References)	Embedded in RFP	Requires Reference Signature
Attachment 10 – Key Staff Resumes and Qualifications	Separate Excel File (10.1 – 10.9)	Separate file for each Key Staff
Attachment 11 – Key Staff Reference Forms (2 Separate References per Key Staff)	Embedded in RFP	Separate files for each Key Staff – 18 separate files Requires Reference Signature
Attachment 13 – Staff Loading Worksheets	Separate Excel File	Must match Price Schedule Staff Loading Worksheets
Attachment 14 – DARFUR Contracting Act Certification	Embedded in RFP	Requires Signature
Attachment 15 – Certificate of Firm Status	State Document	

# CalSAWS BenefitsCal M&O Bidder's Conference

## Proposal File Structure

- RFP Section 6.3.2.1, File Structure and File Name Conventions, clearly indicates how Bidders are to organize and label the Business and Price Proposal volumes and sections within each volume.
- See examples below:
  - Vol 1 BenefitsCal Business Proposal - Bidder Name
    - ✦ Vol 1 Cover Page – Bidder Name
    - ✦ Vol 1 Transmittal Letter – Bidder Name
    - ✦ Vol 1 Sect 1 Executive Summary – Bidder Name
    - ✦ Vol 1 Sect 2 Firm Qualifications – Bidder Name
    - ✦ Vol 1 Sect 5 Att 8 Firm Mandatory Requirements – Bidder Name
    - ✦ Vol 1 Sect 5 Att 10.X Key Staff Resume and Quals – Bidder Name Staff Name

# CalSAWS BenefitsCal M&O Bidder's Conference

## Volume 2 Price Proposal Schedules

1. SFY Summary (Automatically populated)
  2. Deliverables
  3. Transition-In Staff Loading
  4. Software
  5. Services (Automatically populated)
  6. Staff Loading
    - Base Contract Years 1 – 6
  7. Optional Extension Years 1 – 4
  8. Hourly Rate Card (Base Contract)
  9. Change Order Hourly Rate Card
  10. AWS IaaS Resources (Not Included in SFY Summary Price)
  11. Other
- RFP Section 6.3.4 contains detailed instructions for each Price Schedule worksheet. Price proposals must reflect the existing terms and conditions within the Agreement. Bidders are explicitly not allowed to document assumptions which modify Agreement terms.

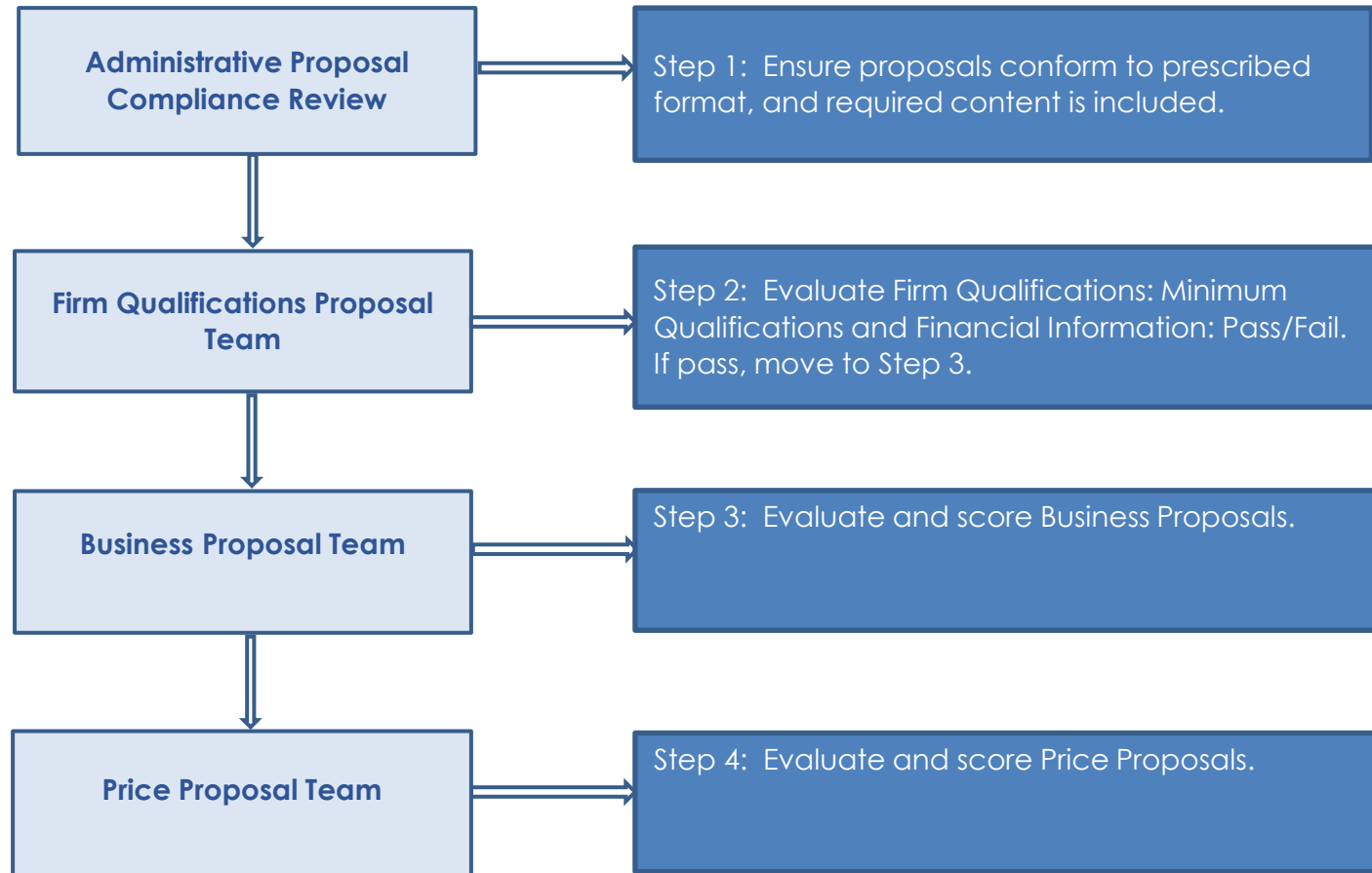


# Proposal Evaluation

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# CalSAWS BenefitsCal M&O Bidder's Conference

## Evaluation Process



# CalSAWS BenefitsCal M&O Bidder's Conference

## Evaluation Methodology

PROPOSAL EVALUATION METHODOLOGY				
	CATEGORY/SUBCATEGORY	SUBCATEGORY WEIGHT	OVERALL WEIGHT	TOTAL POINTS POSSIBLE
	<b>Business Proposal</b>		<b>70.0%</b>	<b>70.0</b>
1	Firm Qualifications: Firm References	<b>5.0%</b>		
2	Staff Qualifications, Oral Presentations and Key Staff Interviews	<b>25.0%</b>		
	▪ Staff Qualifications and Experience	10.0%		
	▪ Oral Presentations	5.0%		
	▪ Key Staff Interviews	10.0%		
3	Understanding and Approach	<b>40.0%</b>		
	▪ Integrated Multi-Contractor Environment	10.0%		
	▪ Software Development	10.0%		
	▪ Application Evolution and Innovation	10.0%		
	▪ User Experience, Marketing and Public Communications	10.0%		
	Total Business Proposal Scores			<b>70.0</b>
	<b>Price Proposal</b>		<b>30.0%</b>	<b>30.0</b>
4	Five (5 ) Years and Five (5) Months Base Contract Term (Excluding 6-Month Transition-In Period)	<b>30.0%</b>		<b>30.0</b>
	Total Price Proposal Scores			30.0
	<b>Business Proposal + Price Proposal Total</b>		<b>100.0%</b>	<b>100.0</b>

# CalSAWS BenefitsCal M&O Bidder's Conference

## Business Proposal Evaluation and Scoring Steps

- 1) Once the individual reviews of each Business Proposal are completed, the Evaluation Team will meet to review and discuss the rationale for scores. The Evaluation Team will discuss the Proposals and reach consensus on the scoring of each Understanding and Approach requirement.
- 2) The Evaluation Team will also discuss the Proposals related to the Staff Qualifications area.
  - The Oral Presentations and Key Staff Interviews will be rated on a 1-10 scale.
  - Once the Oral Presentations and Key Staff Interviews are completed, the Evaluation Team will reach consensus on the total score for the Staff Qualifications, Oral Presentations and Key Staff Interviews.
- 3) The resultant points for each subsection will be multiplied by the subcategory weight and totaled to create a weighted or normalized Business Proposal score.
- 4) The Bidder with the highest Business Proposal score will receive the maximum possible score (70 points).
- 5) The scores of the other Bidders will be normalized as follows:

***(Business Proposal Score/Highest Business Proposal Score) \* 70 = Normalized Business Proposal Score***



# CalSAWS BenefitsCal M&O Bidder's Conference

## Staff Qualifications Evaluation

- The Staff Qualifications section of the Bidder's Proposal and related Attachments will be evaluated in the following areas and in accordance with RFP requirements:
  - The extent to which the minimum Staff qualifications were met and/or exceeded.
  - Experience of proposed Staff providing BenefitsCal or other like portal/mobile Services.
  - The justification of Staff types and levels proposed.
  - Key Staff client references.
  - Performance in Oral Presentations.
  - Performance in Key Staff interviews.

# CalSAWS BenefitsCal M&O Bidder's Conference

## Staff Qualifications Evaluation

1	<b>Staff Qualifications, Oral Presentations and Key Staff Interviews</b>	<b>25.0%</b>
	▪ Staff Qualifications and Experience	10.0%
	▪ Oral Presentations	5.0%
	▪ Key Staff Interviews	10.0%

- Key Staff Positions

1. Project Manager
2. Project Management Office (PMO) Lead
3. Transition-In Lead
4. Application Manager
5. Product Manager
6. User Centered Design Lead
7. Test Manager
8. Security Manager
9. Public Communications Lead

# CalSAWS BenefitsCal M&O Bidder's Conference

## U&A Evaluation

<b>2</b>	<b>Understanding and Approach</b>	<b>40.0%</b>
	▪ Integrated Multi-Contractor Environment	10.0%
	▪ Software Development	10.0%
	▪ Application Evolution and Innovation	10.0%
	▪ User Experience, Marketing and Public Communications	10.0%

- For each of these areas, the Consortium will consider the clarity and completeness of the response and evidence of the Bidder's understanding of the RFP requirements.
- In scoring the Bidder's proposal, the Consortium will consider the extent to which the Bidder has demonstrated an Understanding and Approach by which the CalSAWS Future State and vision as described in Section 4 will be realized.
- Each U&A Section is limited to 30 pages.

# CalSAWS BenefitsCal M&O Bidder's Conference

## Price Proposal Evaluation

- The Price Proposals will be evaluated based on:
  - The total price of the five-year and five-month Base Contract period Base Contract Period (excluding the Transition-In Period).
  - All Price Proposals will then be ranked from lowest price to highest price.
  - Each Contractor will receive a score for the Base Period based on a proration of 30 points, with the lowest Price Proposal allocated the maximum available 30 points and each higher Price Proposal receiving a normalized (reduced) score based on the lowest Price Proposal divided by each of the higher Price Proposals.
  - The Price Proposal evaluation formula is:

$$\text{Contractor Price Score} = (\text{Lowest Price} / \text{Contractor Price})$$

## Evaluation Methodology

- Best and Final Offers (BAFOs)
  - The Consortium reserves the right to require one or more Best and Final Offers from one or more Contractors, requesting a final adjustment, confirmation, or resubmission of any or all parts of the Business and Price Proposals.



# Notice of Intent to Award and Posting of Information

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# CalSAWS BenefitsCal M&O Bidder's Conference

## Notice of Intent to Award – Posting of Information

- Upon issuance of the NOIA, the Consortium will post on its website: (1) the non-confidential portion of all Bidder Proposals; (2) the final comprehensive evaluation scoring workbook for each Bidder; (3) the master comprehensive scoring workbook; and (4) the Consortium's Vendor Selection Report ("VSR") setting forth the Consortium's rationale underlying its selection of the successful Bidder.
- Upon issuance of the Notice of Intent to Award pursuant to Section 9, the Consortium will post to [www.CalSAWS.org](http://www.CalSAWS.org) for public viewing only Volumes 3A and 3B, assuming those volumes are supported by a separate statement justifying the redactions in those volumes. (See Section 7.8 of this RFP for requirements for redaction of Proposals to protect material Bidders claim to be confidential and proprietary.)



# RFP Q&A

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# CalSAWS BenefitsCal M&O Bidder's Conference

## Procurement Overview – Questions and Answers (Q&A)

- Q&A in Process
  - 12 vendor questions received.
- Consortium responses to these 12 questions will be posted on Friday, June 14 along with Addendum 1



# Question and Answer Period

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# CalSAWS BenefitsCal M&O Bidder's Conference

## Questions & Answer Period

- Open for Vendor Questions regarding the RFP. Any question for which a formal response is requested should also be submitted in writing per the RFP instructions.
- Vendors who are physically present must use the podium microphone and state your name, your organization and your question.
- Once all in-person questions have been asked, virtual questions may be asked using the “raise your hand” feature in Teams. Please wait for us to call on you, then state your name, your organization and your question.
- We will not address questions using the chat feature in Teams.





## Next Steps



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# Next Steps

- ① Prospective Bidders are to submit any questions regarding the RFP as soon as possible, but no later than June 18, 2024.
- ② The Consortium Procurement Team will respond to questions on a flow basis.
- ③ The Consortium intends to issue Addendum 1 on June 14, 2024. This addendum will include the following information at a minimum:
  - A. RFP revisions associated with Q&A to date
  - B. Updated Attachment 6 – BenefitsCal Agreement
- ④ The Consortium anticipates issuing at least one additional addendum on July 3, 2024.

