

Bidder's Conference

Quality Assurance (QA) Services RFP 01-2025

August 14, 2025

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CalSAWS



Welcome, Speaker Introductions and Housekeeping

Welcome, Housekeeping and Introductions

- Welcome
- Speaker Introductions
- Housekeeping
 - No video or audio recording is permitted
 - No transcripts or minutes will be produced
 - Please note your name and organization using the 'Chat' feature
 - Please mute your line
 - Questions may be asked at the conclusion of the presentation by using the 'Raise hand' feature
 - Vendors may access a copy of this presentation via [CalSAWS Procurement Listings](#)
 - Future questions may be directed to ProcurementTeam@CalSAWS.org

Bidder's Conference Purpose

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.
 - Official procurement email address: ProcurementTeam@CalSAWS.org
- For QA Services Procurement Library access, contact ProcurementTeam@CalSAWS.org for credentials.

Agenda

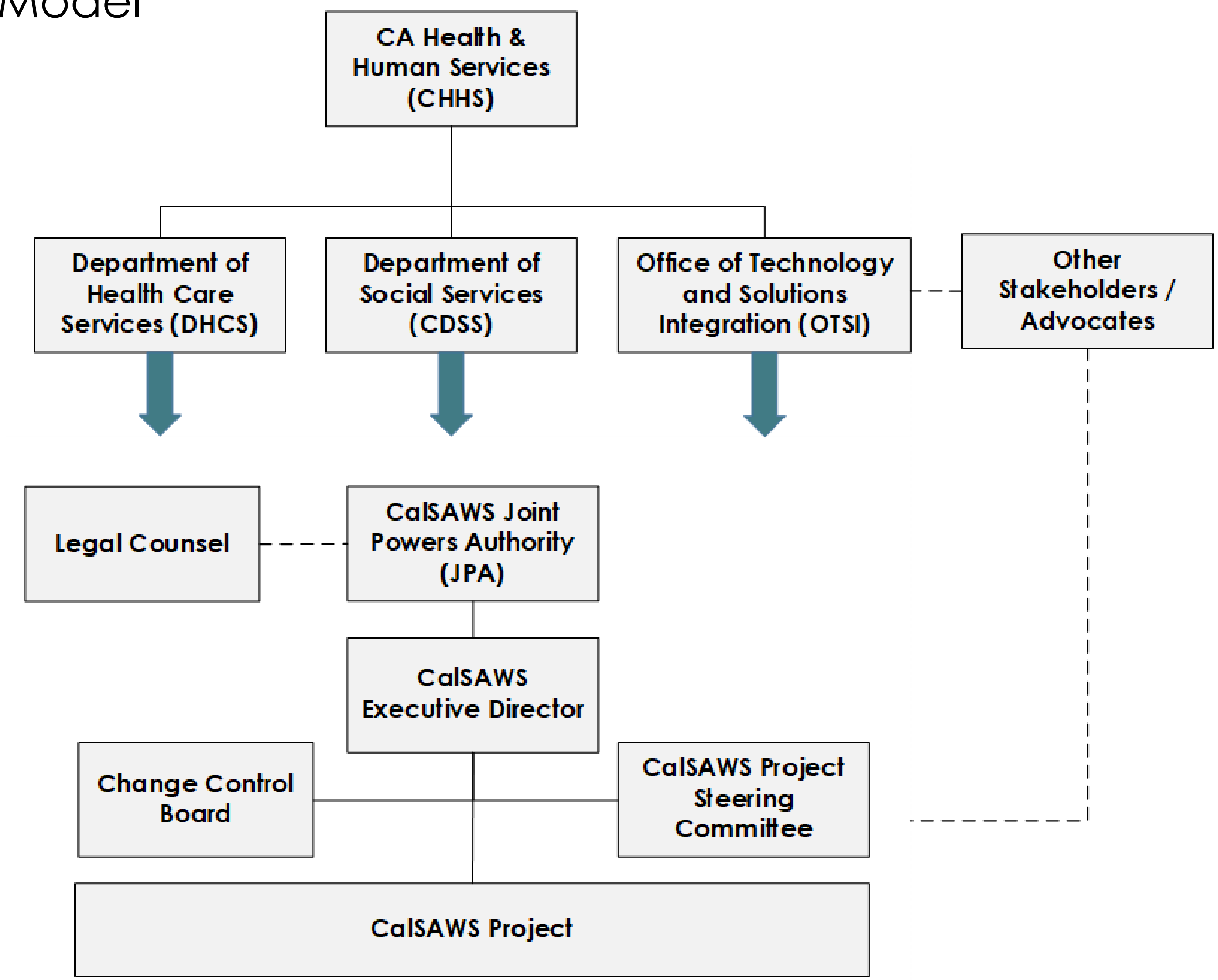
Agenda

1. Consortium and Governance Overview – Tom Hartman
2. QA Services Future Vision – Betty Uzupis
3. Procurement Overview and Scope – Dave Sodergren
4. Proposal Content and Submission – Dave Sodergren
5. Proposal Evaluation – Betty Uzupis
6. Notice of Intent to Award – Tom Hartman
7. Open Question and Answer Period – Tom Hartman
8. Next Steps – Tom Hartman

CalSAWS Consortium Overview

CalSAWS Consortium Overview

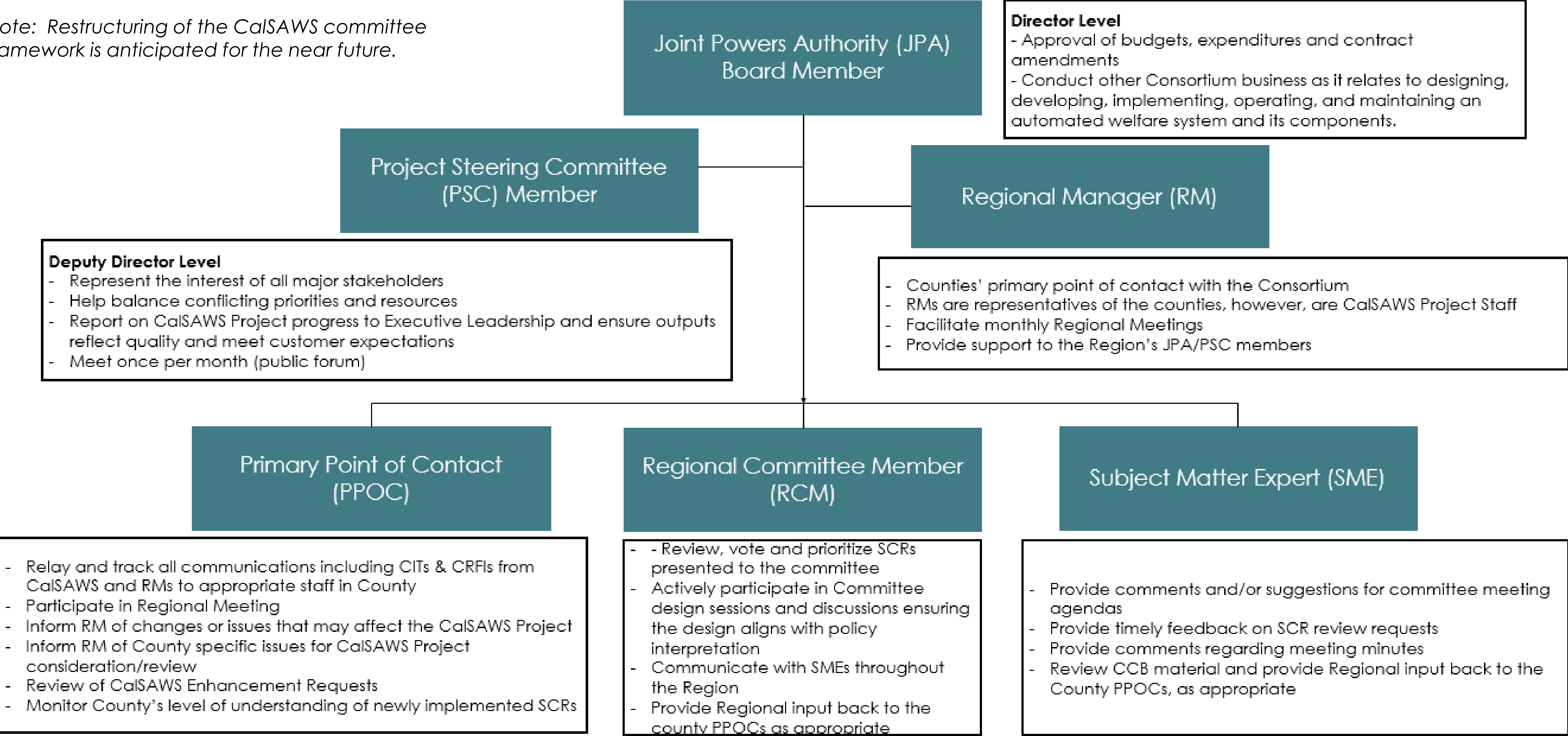
Governance Model



CalSAWS Consortium Overview

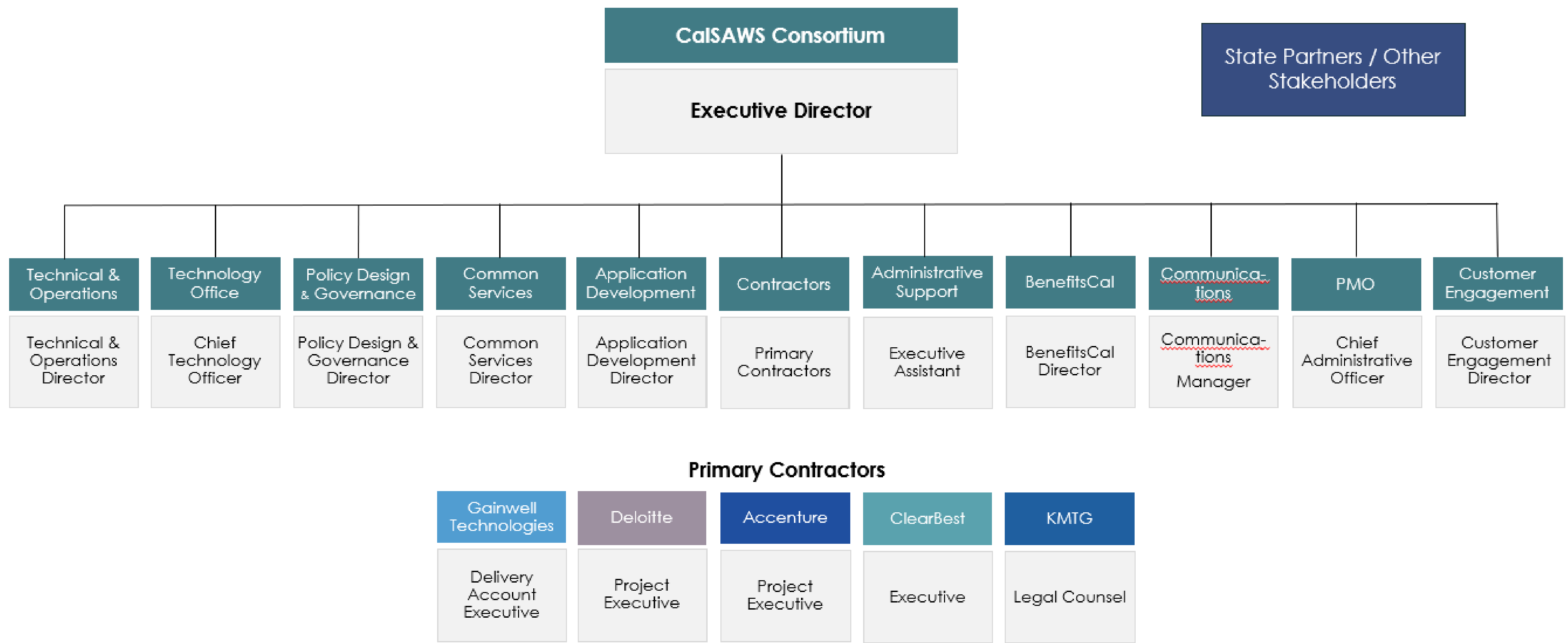
Governance Structure

Note: Restructuring of the CalSAWS committee framework is anticipated for the near future.



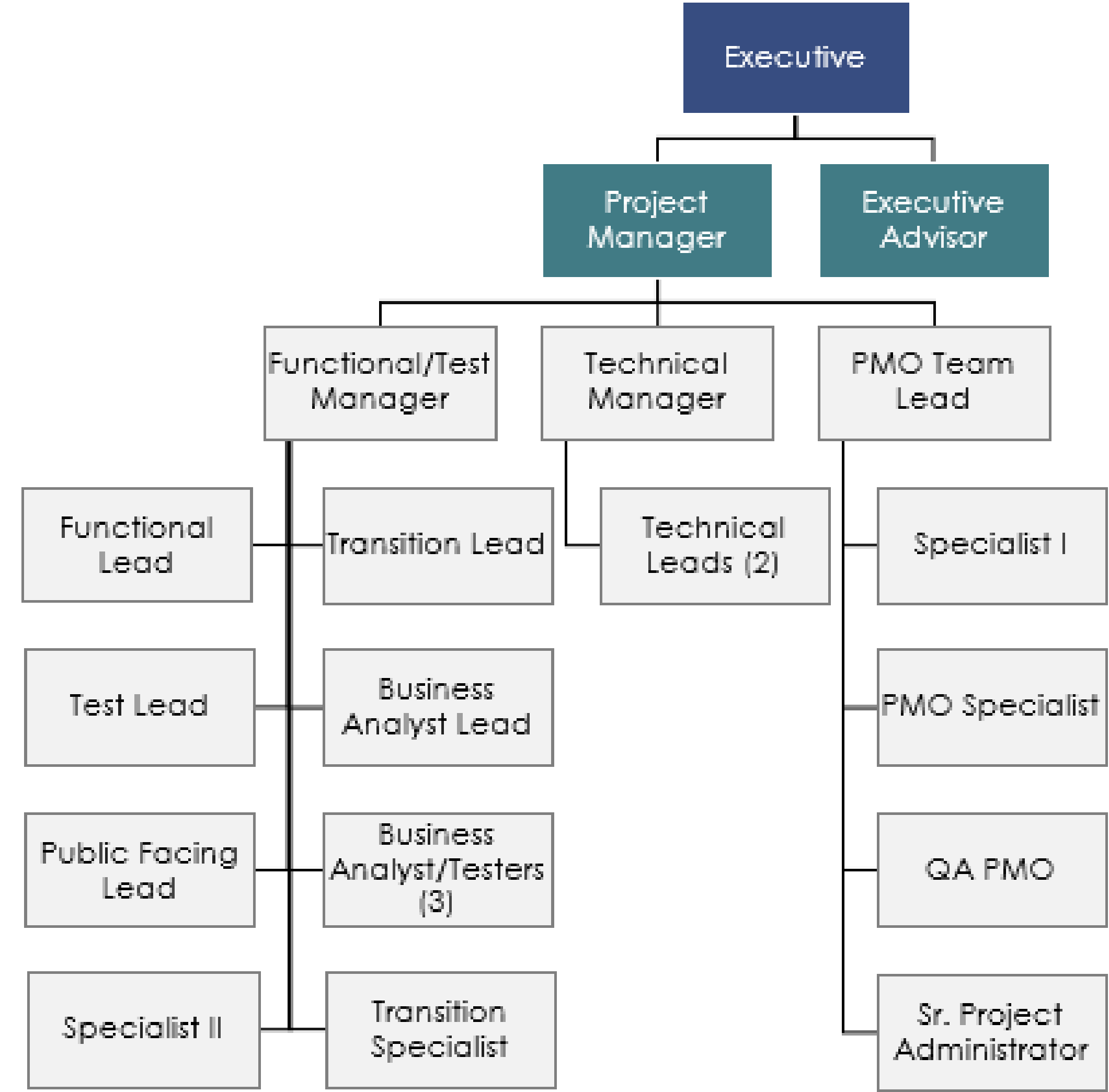
CalSAWS Consortium Overview

Multi-Contractor Organization



CalSAWS Consortium Overview

Current QA Services Team - ClearBest



QA Services Future Vision

QA Services Future Vision

CalSAWS M&O Vision

- Integrated CalSAWS Organization
- Application Change Process/Software Development Process
- Enhance Communication and Outreach
- Application/Architecture Evolution and Innovation

QA Vision

- Understand and adhere to established project processes.
- Fully integrate within the CalSAWS ecosystem.
- Make recommendations for improvements: PMO, FinOps, SDLC/SCRs, UCD/UX, architecture, data analytics, reporting, security, Collaboration Model

QA Objectives

- Proactively explore and recommend process, documentation and system improvements to enhance overall quality.
- Conduct independent test of the CalSAWS suite of applications.
- Identify situations, occurrences and deficiencies where requirements, standards or SLAs are not met.

Procurement Overview and Scope

Procurement Overview and Scope

- Independent review and assessment of CalSAWS Deliverables, work products, applications and services, including independent testing of the CalSAWS application and its ancillary systems.
- Identify and report situations, occurrences, and deficiencies where requirements, standards and Service Level Agreements (SLAs) are not met by the Consortium's other Contractors.
- Bidders will formally attest to the acceptance of all requirements.
- Bidders will formally respond to the RFP Understanding and Approach requirements.

Procurement Overview and Scope

Contract

■ Term

- Two-month Transition-In period: December 1, 2026 – January 29, 2027
- Base Contract: December 1, 2026 – January 31, 2033 (6 years + 2 months)
- Extensions (up to 4 years): February 2033 – January 2037
- Total Contract Term if all extensions are exercised: 10 years + 2 months

Procurement Overview and Scope

Attachment 2 - Requirements

- Requirements in Attachment 2 of RFP do not require a narrative response, nor are they individually scored.
- Bidders must agree to satisfy all requirements included in this attachment by completing Attachment 4 – Statement of Compliance with QA Services Requirements Form.
- Requirements organized into five Task Areas:
 1. Transition-In Requirements (6 Requirements)
 2. Management Requirements (21 Requirements)
 3. Quality Assurance Requirements (88 Requirements)
 4. Independent Test Requirements (11 Requirements)
 5. Transition-Out Requirements (7 Requirements)

(133 Total Requirements)

Procurement Overview and Scope

Attachment 3 - Deliverables Inventory

1. Quality Assurance Services Plan and Operational Working Documents
2. Quality Assurance Work Schedule
3. Quality Assurance Monthly Status Report
4. Quality Assurance Independent Test Plan and Operational Working Documents
5. Quality Assurance Monthly Test Report
6. Quality Assurance Final Project Closeout Report

Procurement Overview and Scope

Procurement Timeline – Key Tasks

	M&O PROCUREMENT EVENT	DUE DATE
1	Release of RFP	08/11/25
2	Conduct Bidder's Conference	08/14/25
3	Bidder Question Period	08/12/25 - 09/02/25
4	Consortium Releases Responses on a Flow Basis	08/19/25 - 09/09/25
5	Consortium Releases Final Q&A and Addendum	09/16/25
6	Bidders Request Proposal Response SharePoint Folder from OTSI	09/18/25
7	Proposal Due Date	10/20/25
8	Evaluate Administrative Compliance and Firm Qualifications	10/21/25 - 11/14/25
9	Evaluate Business Proposals	11/18/25 - 03/10/26
10	Conduct Oral Presentations and Key Staff Interviews	03/02/26 - 03/05/26
11	Evaluate Price Proposals	03/11/26 - 03/26/26

Procurement Overview and Scope

Procurement Timeline – Key Tasks

	M&O PROCUREMENT EVENT	DUE DATE
12	Contract Exceptions Discussions	04/01/26 - 04/02/26
13	Conduct Confidential Vendor Discussions	04/15/26 - 04/16/26
14	Issue Instructions for Best and Final Offers (BAFOs)	04/21/26
15	BAFO Due Date	05/06/26
16	Evaluate BAFO Business and Price Proposals	05/07/26 - 05/26/26
17	Prepare Vendor Selection Report (VSR) and Approval	06/03/26 - 07/08/26
18	Issue Notice of Intent to Award and VSR	07/09/26
19	Agreement Negotiation Period	07/13/26 - 07/21/26
20	State, Federal and Consortium JPA Board of Directors Contract Approvals of Agreement	07/24/26 - 11/20/26
21	Tentative Contract Start Date	12/1/26
22	Transition-In Period	12/1/26 - 01/29/27

Proposal Content and Submission

Proposal Content

Proposal Organization and Content

■ Volume 1 Business Proposal

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

■ Volume 2 Price Proposal

1. Cover Page
2. Attachment 5 – Price Proposal Schedules

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

■ Volume 3A* – Business Proposal with Confidential or Proprietary Portions Redacted – Optional

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

■ Volume 3B* – Price Proposal with Confidential or Proprietary Portions Redacted – Optional

0. Justification to Redact Letter
1. Cover Page
2. Attachment 5 – Price Proposal Schedules

Proposal Content

Requirement Attachments

Section 5 Required Attachments – Volume 1 Business Proposal		
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	Embedded in RFP	Requires Reference Signature
Attachment 10 – Key Staff Qualifications	Separate Excel File (10.1 – 10.4)	Separate file for each Key Staff
Attachment 11 – Key Staff Reference Forms	Embedded in RFP	Two separate files for each Key Staff – 8 total Requires Reference Signature
Attachment 12 – Staff Loading Worksheets	Separate Excel File	Must match Price Schedule Staff Loading Worksheets
Attachment 13 – Iran Contracting Act Certification	Embedded in RFP	Requires Signature
Attachment 14 – Certificate of Firm Status	State Document	

Proposal Content

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 (First Last)

Proposal Content

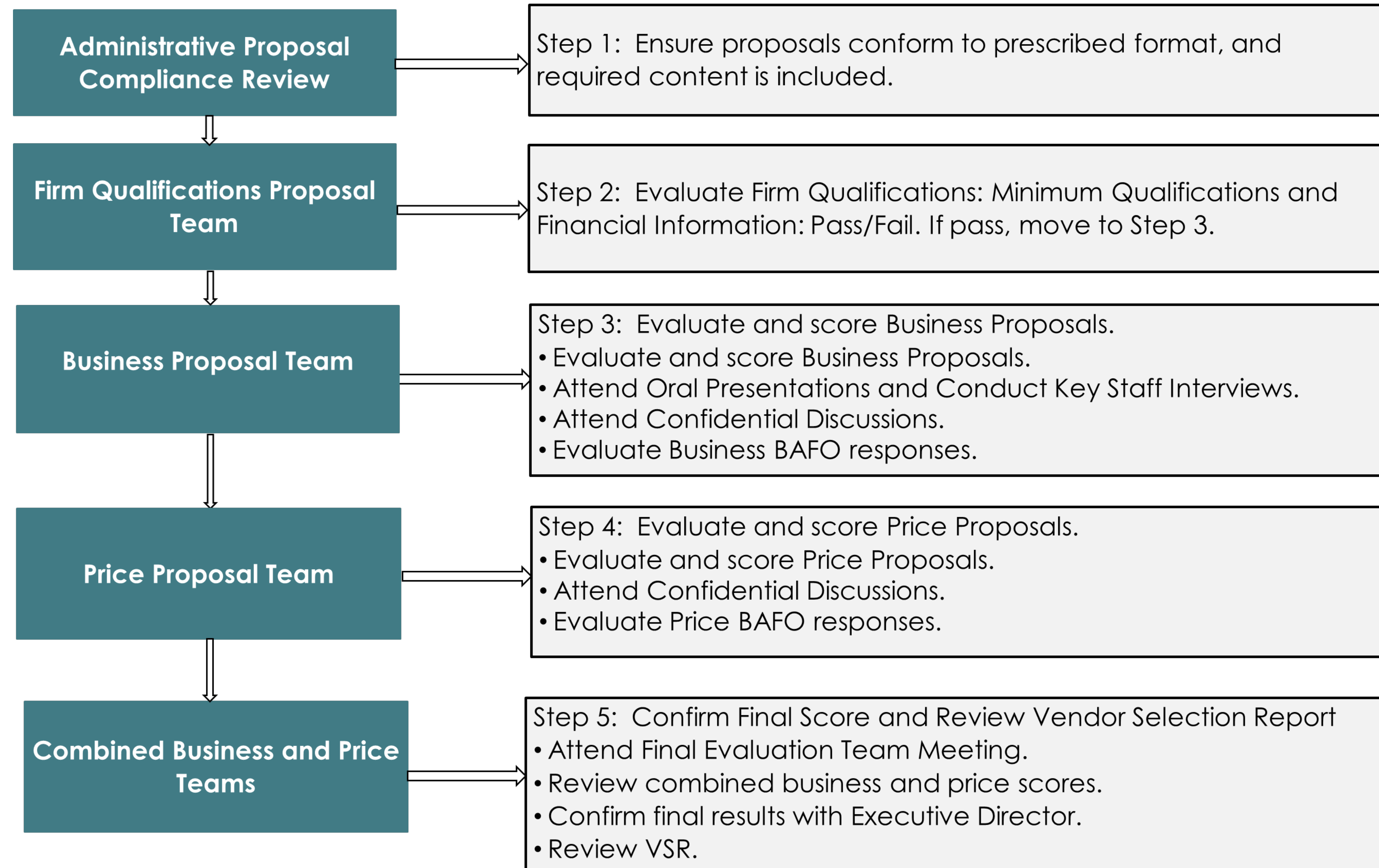
Volume 2 Price Proposal Schedules

1. SFY Summary (Automatically populated)
 2. Deliverables
 3. Transition-In Staff Loading
 4. QA Services (Automatically populated)
 5. Staff Loading
 6. Optional Extension Years 1 – 4
 7. Hourly Rate Card (Base Contract)
 8. Change Order Hourly Rate Card
 9. 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

Proposal Evaluation

Evaluation Process



Proposal Evaluation

PROPOSAL EVALUATION METHODOLOGY				
	CATEGORY/SUBCATEGORY	SUBCATEGORY WEIGHT	OVERALL WEIGHT	TOTAL POINTS POSSIBLE
	BUSINESS PROPOSAL		70.0%	700.0
1.	Firm Qualifications: Firm References	5.0%		
2.	Staffing	25.0%		
	▪ Staff Qualifications and Experience	10.0%		
	▪ Oral Presentations	5.0%		
	▪ Key Staff Interviews	10.0%		
3.	Understanding and Approach	40.0%		
	▪ Approach to QA Staffing	10.0%		
	▪ Approach to QA Services – Integrated Multi-Contractor Environment	10.0%		
	▪ Approach to QA Services – Software Development Lifecycle	10.0%		
	▪ Approach to Independent Test	10.0%		
	Total Business Proposal Scores			700.0
	PRICE PROPOSAL		30.0%	300.0
4.	Six Year Base Contract Term (Excluding 2-Month Transition-In Period)	30.0%		
	Total Price Proposal Scores			300.0
	BUSINESS PROPOSAL + PRICE PROPOSAL TOTAL		100.0%	1,000.0

Proposal Evaluation

Business Proposal Evaluation and Scoring

1. Firm References: The Evaluation Team will review, discuss and confirm the scores for the Firm References for each Bidder.
2. U&A Requirements: Each individual Evaluation Team member will review and score the U&A requirements for each Business Proposal. Once the individual U&A scores are completed, the Evaluation Team will meet to review and discuss the rationale for the scores. The Evaluation Team will discuss the Proposals and reach consensus on the team score for each U&A requirement.
3. The Evaluation Team will review and discuss the Proposals related to the Staff Qualifications area and confirm the team scores for each proposed Key Staff person.
 - 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.
4. The resultant points for each subsection will be multiplied by the subcategory weight and totaled to create a weighted or normalized Business Proposal score.
5. The Bidder with the highest Business Proposal score will receive the maximum possible score (70 points).
6. The scores of the other Bidders will be normalized as follows:

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

Proposal Evaluation

Staff Qualifications Evaluation

- Key Staff Positions
 1. QA Project Manager
 2. QA Test Manager
 3. QA Functional Manager
 4. QA Technical Manager

Staff Qualifications, Oral Presentations and Key Staff Interviews	25.0%
Staff Qualifications and Experience	10.0%
Oral Presentations	5.0%
Key Staff Interviews	10.0%

Proposal Evaluation

U&A Evaluation

- 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.

Understanding and Approach	40.0%
Approach to QA Staffing	10.0%
Approach to QA Services – Integrated Multi-Contractor Environment	10.0%
Approach to QA Services – Software Development Lifecycle	10.0%
Approach to Independent Test	10.0%

Proposal Evaluation

Price Proposal Evaluation

- The Price Proposals will be evaluated based on:
 - The total price of the six-year 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:

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

Proposal Evaluation

Best and Final Offers

- 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

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 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.)

Open Question & Answer Period

Open Question & Answer Period

Process

- Open for vendor questions. We will take questions regarding the procurement process and schedule.
- Verbal responses provided here today are not binding on the Consortium.
- Any question for which a formal response is requested should also be submitted in writing per the RFP instructions.
- Virtual questions may be asked using the 'Raise 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

Next Steps

- Prospective Bidders are to submit any questions regarding the RFP as soon as possible, but no later than September 2, 2025.
- The Consortium Procurement Team will respond to questions on a flow basis.
- The Consortium intends to issue Addendum 1 on August 26, 2025. This addendum will include the following information at a minimum:
 - RFP revisions associated with Q&A to date.
- The Consortium anticipates issuing the final addendum and Q&A on September 16, 2025.

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Any Questions?



Thank you for Attending!

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