

# Bidder's Conference

Legal Services Request For Proposals  
(RFP) 01-2026

February 11, 2026

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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](mailto:ProcurementTeam@CalSAWS.org)



# Agenda

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1. Welcome, Housekeeping and Speaker Introductions – Holly Murphy
2. Purpose – Betty Uzupis
3. Consortium and Governance Overview – Betty Uzupis
4. Procurement Overview and Scope – Dave Sodergren
5. Proposal Content and Submission – Dave Sodergren
6. Proposal Evaluation – Betty Uzupis
7. Notice of Intent to Award – Betty Uzupis
8. Open Question and Answer Period – Dave Sodergren and Betty Uzupis
9. Next Steps – Holly Murphy

# Bidder's Conference Purpose

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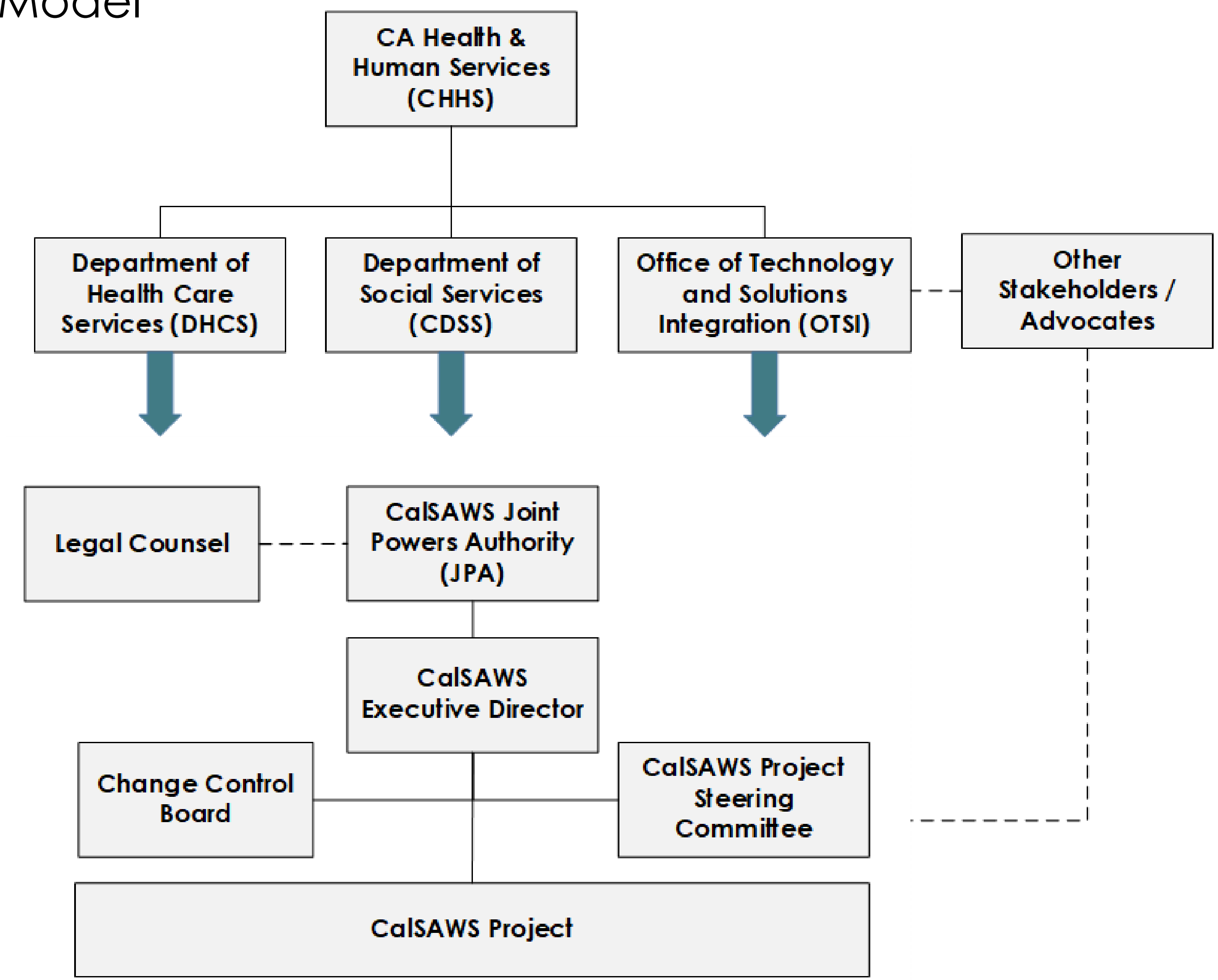
- This is an opportunity for the Consortium to share information with the Legal Services vendor community and answer questions related to the RFP.
- Oral statements and responses are non-binding and subject to change.
- All official information is provided through the processes documented in the RFP.
- Official procurement email address: [ProcurementTeam@CalSAWS.org](mailto:ProcurementTeam@CalSAWS.org)

# CalSAWS Consortium Overview



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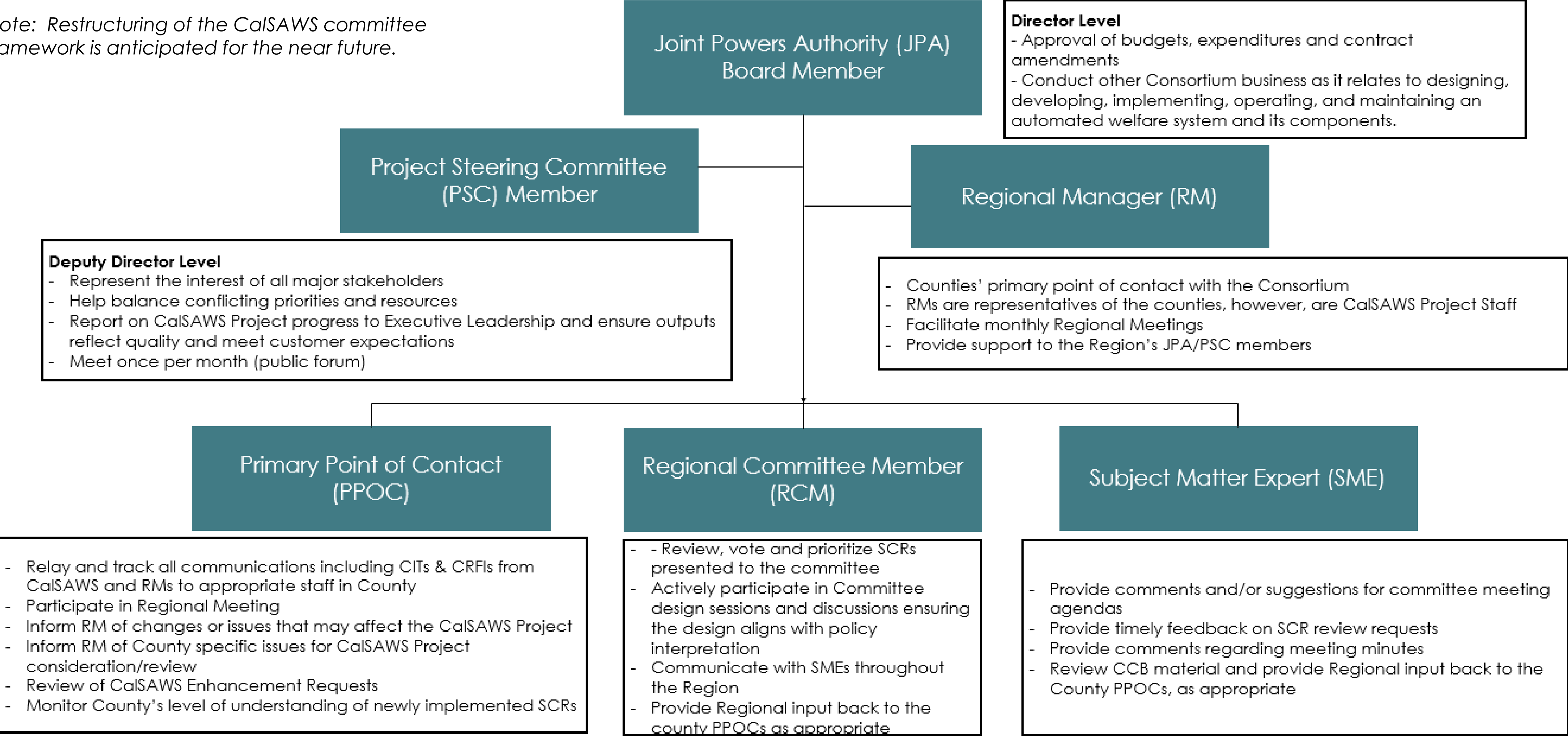
## Governance Model



# CalSAWS Consortium Overview

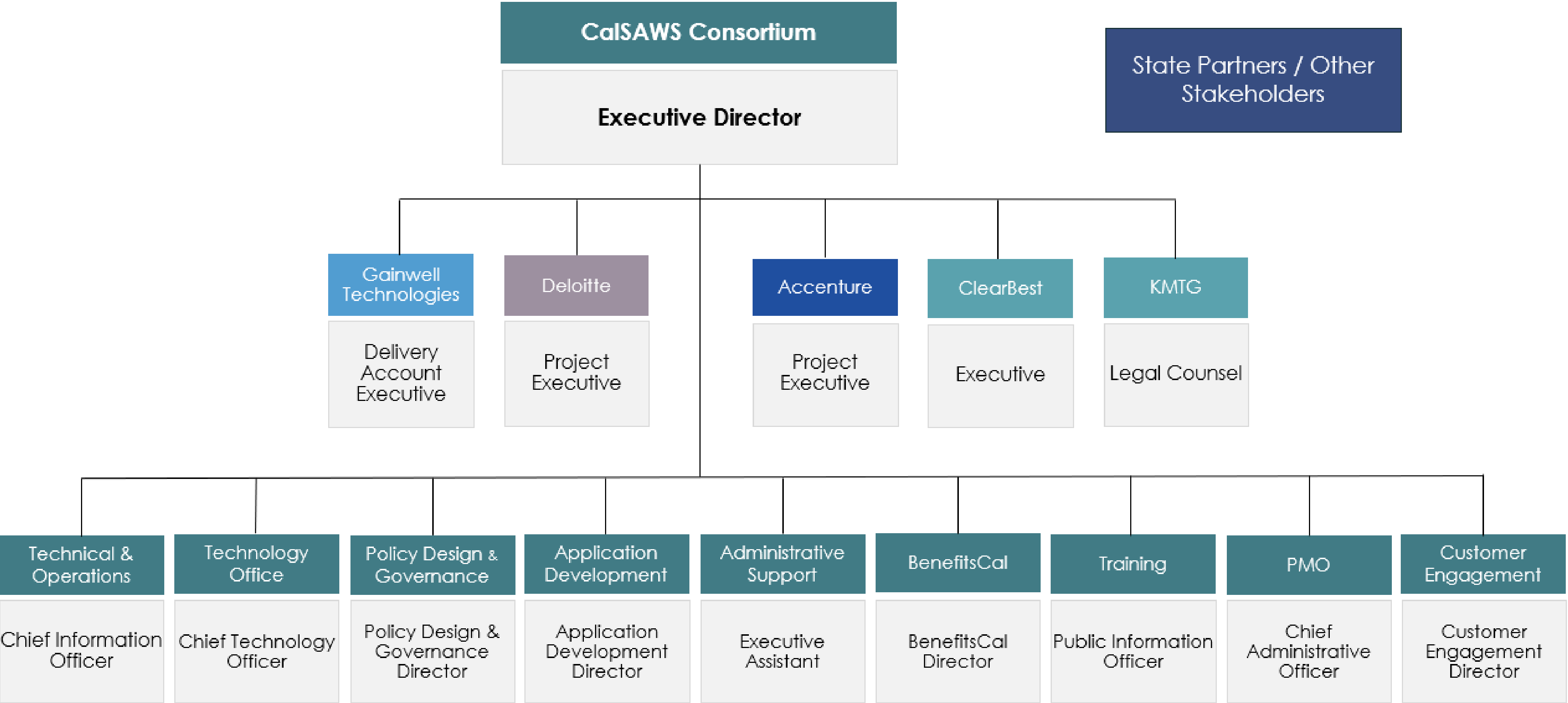
## Governance Structure

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



# CalSAWS Consortium Overview

Multi-Contractor Organization



# Procurement Overview and Scope

# Procurement Overview and Scope

## Contract

### ■ Term

- One-month Transition-In period: February 1 – 27, 2027
- Base Contract: February 1, 2027 – February 28, 2033 (6 years + 1 month)
- Extensions (up to 4 years): March 2033 – February 2037
- Total Contract Term if all extensions are exercised: 10 years + 1 month



# Procurement Overview and Scope

## Attachment 1 – Statement of Work

- Bidders must agree to satisfy all requirements included in Section 3 and this attachment by completing Attachment 3 – Statement of Compliance with Requirements Form.
- The Legal Services contractor must provide services in support of:
  - California Joint Powers Authority (JPA) Governance / Brown Act
  - Procurement Support including Evaluation and Appeal strategies
  - Contract/Agreement Development and Amendment Negotiations
  - California Public Records Act (CPRA) / Public Information Law
  - Technology/Artificial Intelligence (AI) California Law
  - Privacy/Security Breach Remediation
  - Trademark Law
  - Americans with Disability Act (ADA)
  - Health Insurance Portability and Accountability Act (HIPAA)

# Procurement Overview and Scope

## RFP Section 3.2.3 – Legal Services Approach

- Bidders will formally respond to the RFP Understanding and Approach (U&A) requirements:
  - Approach to Procurement Support
  - Approach to Contract Negotiations, Agreement Development and Agreement Review
  - Approach to General Legal Support including Governance and Employment Issues

# Procurement Overview and Scope

## RFP Section 3.2.3 – Legal Services Approach

- Approach to Procurement Support
  - Describe your approach to RFP development and the review of RFP documents
  - Describe your approach to assisting the Consortium in structuring proposal evaluation processes
  - Describe your approach to establishing and leading appeal-related processes
- Approach to Contract Negotiations, Agreement Development and Agreement Review
  - Describe your approach to negotiating Agreements and Addenda with IT Systems Contractors and supporting Contractors
  - Describe your approach to Agreement Development
  - Describe your approach to the preparation of CalSAWS Contractor Agreement Addenda or Amendments, Change Orders and the like

# Procurement Overview and Scope

## RFP Section 3.2.3 – Legal Services Approach

- Approach to General Legal Support including Governance and Employment Issues
  - Describe your approach to supporting CalSAWS JPA Governance, including the Brown Act
  - Describe your approach to supporting CPRA and public information requests
  - Describe your approach to supporting negotiations with IT vendors related to security/privacy breaches

# Procurement Overview and Scope

## Key Procurement Tasks

	Legal Services Procurement Event	Dates
1	Release RFP	January 30, 2026
2	Conduct Bidder's Conference	February 11, 2026
3	Bidder Question and Answer Period	February 2 – March 2, 2026
4	Consortium Publishes Final Q&A and RFP Addendum	March 10, 2026
5	Proposals Due	April 8, 2026
6	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	April 9, 2026 – September 29, 2026
7	Prepare and Approve Vendor Selection Report	September 30 – November 6, 2026
8	Publish Notice of Intent to Award and VSR	November 9, 2026
9	Contract Negotiations	November 12 – 25, 2026
10	Contingency Period	December 4, 2026 – January 11, 2027
11	JPA BOD Approval	January 15, 22 or 29, 2027
12	Contract Start	February 1, 2027
13	Transition-In Period (1 Month)	February 1 – 26, 2027



# 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 4 – Legal Services Hourly Rates

# Proposal Content

## Requirement Attachments

Section 5 Required Attachments – Volume 1 Business Proposal		
Attachment	Source	Notes
Attachment 2 – Justification for Redacted Proposal Content Form	Embedded in RFP	Requires Signature
Attachment 3 – Statement of Compliance with Requirements	Embedded in RFP	Requires Signature
Attachment 6 – Exceptions to the Agreement	Embedded in RFP	Requires Signature
Attachment 7 – Firm Mandatory Qualifications	Embedded in RFP	
Attachment 8 – Firm Reference Form	Embedded in RFP	Requires Reference Signature
Attachment 9 – Certificate of Firm Status	State Document	

# Proposal Content

## Proposal File Structure

- RFP Section 4.3.2.1, File Structure and File Name Conventions, clearly indicates how Bidders are to organize and label the Business Proposal volumes and sections.
- 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 3 Staffing Approach – Bidder Name
    - ❖ Vol 1 Sect 5 Att 7 Firm Mandatory Qualifications – Bidder Name

# Proposal Content

## Price Proposal – Attachment 4

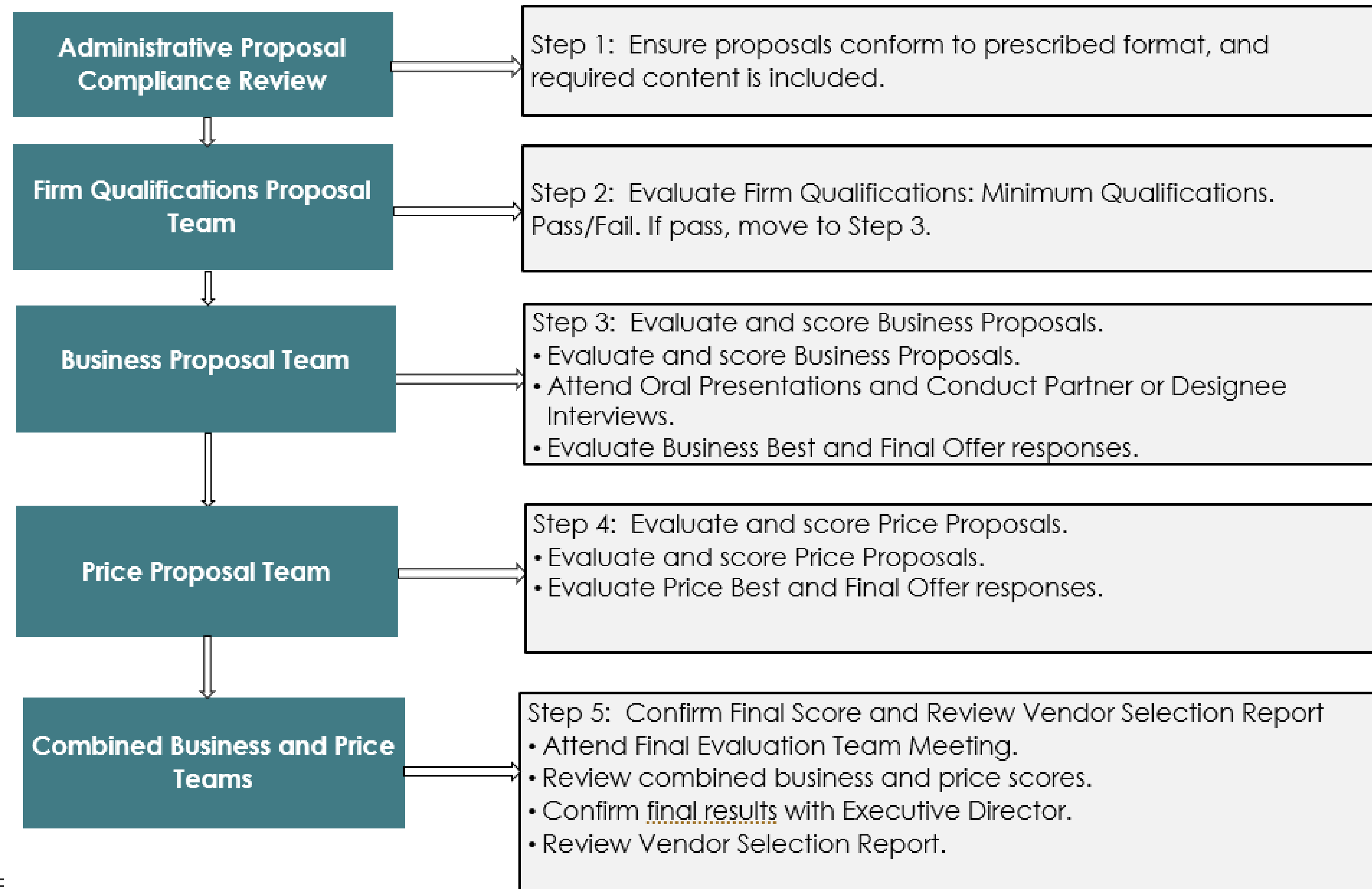
- Bidders are to provide Legal Services Hourly Rates and assumptions for the following positions:
  - Partner or Designee
  - Associate
  - Paralegal
  - Administrative



# Proposal Evaluation

# Proposal Evaluation

## Evaluation Process



# Proposal Evaluation Methodology

PROPOSAL EVALUATION METHODOLOGY				
	CATEGORY/SUBCATEGORY	SUBCATEGORY WEIGHT	<u>OVERALL WEIGHT</u>	TOTAL POINTS POSSIBLE
	<b>BUSINESS PROPOSAL</b>		<b>70.0%</b>	<b>700.0</b>
1.	Firm Qualifications: Firm References	<b>5.0%</b>		
2.	Staffing	<b>35.0%</b>		
	▪ Oral Presentations	15.0%		
	▪ Partner or Designee Interviews	20.0%		
3.	Staffing Approach	<b>10.0%</b>		
4.	Legal Services Approach	<b>20.0%</b>		
	▪ Approach to Procurement Support	20.0%		
	▪ Approach to Contract Negotiations, Agreement Development and Agreement Review			
	▪ Approach to General Legal Services			
	<b>Total Business Proposal Scores</b>			<b>700.0</b>
	<b>PRICE PROPOSAL</b>		<b>30.0%</b>	<b>300.0</b>
5.	Hourly Rate Card	<b>30.0%</b>		
	<b>Total Price Proposal Scores</b>			<b>300.0</b>
	<b>BUSINESS PROPOSAL + PRICE PROPOSAL TOTAL</b>		<b>100.0%</b>	<b>1,000.0</b>

# 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. Approach Requirements: Each individual Evaluation Team member will review and score the U&A topics for each Business Proposal. Once the individual team member 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 Approach requirement.
3. Staffing:
  - The Oral Presentations and Partner or Designee Interviews will be rated on a 1-10 scale.
  - Once the Oral Presentations and Partner or Designee Interviews are completed, the Evaluation Team will reach consensus on the total score for the Oral Presentations and Partner or Designee 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:

***$(\text{Business Proposal Score} / \text{Highest Business Proposal Score}) * 70 = \text{Normalized Business Proposal Score}$***

# Proposal Evaluation

## Staff Qualifications Evaluation

- The Consortium will consider the performance in Oral Presentations and Partner or Designee Interviews.

Oral Presentations and Partner Interviews	35.0%
Oral Presentations	15.0%
Partner or Designee Interviews	20.0%



# 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.
- Each U&A Section is limited to 15 pages.

Understanding and Approach	20.0%
Approach to Procurement Support	
Approach to Contract Negotiations, Agreement Development and Agreement Review	
Approach to General Legal Support including Governance and Employment Issues	

# Proposal Evaluation

## Price Proposal Evaluation

- The Price Proposals will be evaluated based on:
  - The Hourly Rates for each Role.
  - 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 (NOIA)

# 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.

# 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 March 2, 2026.
- The Consortium Procurement Team will respond to questions on a flow basis via the CalSAWS.org procurement website. The source of the questions will not be published.
- The Consortium intends to issue Addendum 1 on March 10, 2026. This addendum will include RFP revisions associated with the Q&A.
- Proposal Due Date: April 8, 2026.

1

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# Any Questions?





# Thank you for Attending!

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