

CalHFA ITSM RFP — Consolidated Vendor Q&A Responses

RFP Section 1.1 — Tentative Schedule of Important Dates

This section provides a tentative schedule of the important milestone dates. Examine these dates carefully and plan accordingly.

	DATE	EVENT
1	Monday, August 24, 2026	Request for Proposals (RFP) issue date
2	Monday, September 8, 2026, 5:00 PM PT	Questions Due for Questions & Answers (Q&A)
3	Tuesday, September 22, 2026, 5:00 PM PT	Official Q&A Responses Released
4	Tuesday, September 29, 2026, 5:00 PM PT	Proposal Due Date
5	Friday, October 23, 2026	Evaluation of Proposals Completed
6	Weeks of October 26 and November 2, 2026	Scripted Platform Demonstration
7	Monday, November 9, 2026	Selection of Vendor & Contract Preparation
8	Thursday, December 3, 2026	Contract Award
9	Monday, January 11, 2027	Start of Service

CONSOLIDATED QUESTION GROUP — Section 1.1

VENDORS & VARIATIONS:

Question: Section 1.1, Tentative Schedule of Important Dates: Given that official Q&A responses are scheduled for September 15 and proposals are due September 22, would CalHFA consider extending the proposal deadline by one week to allow vendors adequate time to incorporate the Q&A responses?"

Question: Section 1.1 – Tentative Schedule of Important Dates The RFP identifies January 4, 2027 as the “Start of Service.” Please confirm whether this represents the implementation/project commencement date or the required production Go-Live date. If it represents project commencement, does CalHFA have a target date for initial production Go-Live?"

CONSOLIDATED RESPONSE

Please be advised that CalHFA has pushed back the tentative schedule.

The new start of service date is the effective date of the agreement to commence work on the project. Initial production Go-Live has not been determined.

RFP Section 1.1.2 — Optional Proof -of-Concept (POC)

CalHFA may request a time-boxed proof-of-concept (POC) lasting up to 14 days to validate critical functionality using CalHFA sample data.

CONSOLIDATED QUESTION GROUP — Section 1.1.2**VENDORS & VARIATIONS:**

Question: Sec. 1.1.2: If CalHFA elects to conduct the optional 14-day proof-of-concept referenced in Section 1.1.2, at what point in the evaluation timeline would it occur — prior to the October 16, 2026 evaluation-completion date, or between evaluation completion and the November 2, 2026 selection date?"

Question: RFP Page 1, Section 1.1.2 – Optional Proof-of-Concept (POC) If CalHFA elects to request the optional POC of up to 14 days, should vendors include POC costs within their proposal pricing, or would the POC scope and associated costs be addressed separately with shortlisted vendors?"

CONSOLIDATED RESPONSE

If POC is conducted, then it would take place after scripted platform demonstration and before selection of vendor & contract preparation.

If a vendor charges POCs, then you must include all associated costs in your proposal.

RFP Section 2.1 — Purpose of RFP

CalHFA is soliciting proposals from qualified firms to implement an enterprise Information Technology Service Management (ITSM) solution that will modernize, standardize, and improve the delivery of IT services across the organization. CalHFA's existing home-grown incident and request tracking system no longer meets operational needs, lacks scalability, and requires extensive manual processes that limit service efficiency and responsiveness.

The Agency seeks to replace this legacy environment with a centralized, integrated ITSM platform capable of managing incidents, service requests, changes, problems, asset information, Service Level Agreements (SLAs), and related IT operations within a unified system. The selected solution will reduce fragmented workflows, strengthen service quality and analyst response times, increase operational efficiency, and support data-driven decision-making. The modernized platform will serve as a foundational capability enabling consistent processes, improved customer experience, and enhanced visibility across CalHFA's technology services.

Vendors must align proposed solutions to CalHFA's three-year ITSM practice roadmap, identifying which features will be implemented in Year 1 versus Years 2–3. This ensures right-sizing and prevents overbuying.

CONSOLIDATED QUESTION GROUP — Section 2.1

VENDORS & VARIATIONS:

Question: Section 2.1, Purpose of RFP: Does CalHFA anticipate any material changes in project scope or priorities during the implementation or three-year ITSM roadmap period?

Question: Section 2.1, Purpose of RFP: Beyond the limitations identified with the current home-grown system, are there specific lessons learned or prior implementation challenges CalHFA would like the selected vendor to address?

Question: Section 2.1, Purpose of RFP: Is there an incumbent vendor currently supporting or maintaining the existing ITSM solution? If so, what is the approximate contract value, and will the incumbent participate in transition and knowledge-transfer activities?

Question: Section 2.1, Purpose of RFP: Are there additional or optional ITSM/ESM capabilities not specifically identified in the RFP that CalHFA would particularly value in the proposed solution or three-year roadmap?

Question: Section 2.1, Purpose of RFP: Which capabilities does CalHFA consider mandatory for the initial implementation/Year 1, and which capabilities may be phased into Years 2 and 3?

Question: Sections 2.1, 3.8, and the January 4, 2027 service-start milestone, does that date represent project kickoff or production go-live, and which modules and integrations are mandatory for Year 1 versus planned for Years 2–3?

Question: Sec. 2.1 — p.2: Three-Year Roadmap — CalHFA requires vendors to align the proposed solution to a three-year ITSM practice roadmap and identify features implemented in Year 1 versus Years 2–3. Please provide the expected or desired ITSM capabilities/processes for Year 1, Year 2, and Year 3, or confirm that vendors may independently recommend the sequencing based on their proposed implementation methodology.

Question: Accessibility: Accessibility Certification — Will CalHFA accept vendor VPAT/ACR documentation as evidence of WCAG 2.1 AA and Section 508 compliance?"

Question: Section 2.1 - Implementation Scope & Phasing - Are there any Section 3 capabilities that CalHFA considers mandatory for Year 1, or should the vendor recommend the Year 1 versus Years 2–3 phasing based on discovery, dependencies, and implementation best practices?

Question: Section 2.1 - Implementation Scope & Phasing - Are there any capabilities CalHFA specifically expects to defer to Years 2–3, or should the vendor recommend the deferred roadmap?

Question: Section 2.1 - Implementation Scope & Phasing - Does CalHFA have a required deployment approach, or may the vendor recommend the appropriate phased, pilot, or full deployment approach?

Question: Section 2.1 - Implementation Scope & Phasing - How much existing ITSM process documentation is available? How closely should the solution follow current processes?

Question: Section 2.1 - Implementation Scope & Phasing - Which current ITSM processes does CalHFA consider highest priority for process redesign and ITIL alignment during Year 1?

Question: Page 2, Section 2.1 – Purpose of RFP The RFP requires vendors to align proposed solutions with CalHFA's three-year ITSM practice roadmap and identify features to be implemented in Year 1 versus Years 2–3. Please provide CalHFA's anticipated priorities for Year 1 and Years 2–3, including the ITSM/ESM practice areas expected for initial Go-Live.

Question: SECTION 2.1, PURPOSE OF RFP (PAGE 2) CalHFA requires vendors to align proposed solutions to a three-year ITSM roadmap and to identify Year 1 capabilities separately from Years 2 and 3 to support right-sizing. Which functional and technical requirements in Section 3 are required for the initial Year 1 production implementation, and which may be proposed as roadmap capabilities for Years 2 and 3?

Question: Sections 2.1, 3, and 3.8, pages 2 to 10: Please identify any existing software licenses, subscriptions, platform entitlements, AI entitlements, integration capabilities, or

non-production environments that may be leveraged by the proposed solution rather than priced as net-new capabilities.

CONSOLIDATED RESPONSE

The RFP outlines CalHFA's intent and required capabilities; however, as noted in the Schedule, dates and activities are **tentative**, and CalHFA reserves all rights to amend, modify, or cancel elements of the solicitation if in the Agency's best interest. Any adjustments to scope or priorities would be managed through standard project governance after vendor selection.

The RFP identifies modernization objectives and the need to reduce manual processes and fragmented workflows. CalHFA expects the selected vendor to conduct process-analysis workshops (Section 3.6.4) and propose ITIL-aligned improvements based on discovery; additional lessons learned will be discussed during project initiation.

CalHFA's current environment is described as home-grown in the RFP. CalHFA does not disclose vendor or contract-value information in this Q&A. Transition and knowledge-transfer expectations for the successful bidder are defined in Section 3.6.6 and related deliverables (Section 3.8).

Vendors may propose complementary capabilities consistent with ITIL v4 practices and CalHFA's integration landscape (e.g., Microsoft 365 Hybrid/GCC and RingCentral). CalHFA will evaluate such options during discovery and roadmap alignment, with final phasing subject to Agency approval.

Vendors must identify Year 1 vs. Years 2–3 features per Section 2.1. CalHFA expects the initial implementation to meet the minimum functional, security, and integration requirements necessary to operate the service desk and comply with Agency standards; the precise sequencing will be confirmed in the project plan following discovery.

Section 5.1.1 indicates that vendors must be capable of providing start of service on Monday, January 11, 2027. These dates mark the commencement of contract services and project start; production go-live timing will be established during planning. Year-1 modules and integrations will be finalized through discovery and the approved implementation plan.

Vendors may recommend sequencing grounded in their methodology, provided they align to CalHFA's three-year practice roadmap and clearly delineate Year 1 vs. Years 2–3. CalHFA will validate and approve the final sequence during discovery and planning.

CalHFA requires the platform to meet WCAG 2.1 AA and Section 508 standards (Section 3.2.9). Vendor-provided VPAT/ACR documentation may be submitted as supporting evidence; CalHFA reserves the right to conduct additional validation and testing prior to acceptance

Vendors should propose a right-sized Year-1 deployment that satisfies core operational, security, and integration needs as specified in Section 3, Problem Management and Incident Management and Request Management would be mandatory for year 1. with the remainder phased over Years 2–3. Final phasing will be confirmed during discovery.

CalHFA has not pre-designated capabilities for deferral. Vendors should recommend deferrals based on dependencies, risk, and business value, subject to Agency review and approval.

Section 3.6.5 allows phased, pilot, or full deployment approaches. Vendors may recommend the most appropriate approach; CalHFA will approve the final plan after discovery.

CalHFA expects vendors to conduct workshops and provide ITIL-aligned recommendations (Section 3.6.4). The solution should meet the Agency's requirements while modernizing and standardizing processes; adherence to current processes will be determined during discovery. CalHFA currently does not have specific ITSM process documentation but is planning to redesign our current processes to closely align with best practices and industry standards.

Problem Management, Incident Management, and Request Management (activities not related to problems or incidents)

CalHFA expects an initial go-live that enables core service desk operations and required security/compliance. Vendors should propose a pragmatic Year-1 scope (e.g., service intake, SLAs, knowledge, change/release, CMDB integrations) and a sequenced roadmap for Years 2–3, subject to Agency review and approval during planning. Problem Management, Incident Management, and Request Management (activities not related to problems or incidents)

All Section 3 requirements apply to the solution overall. Vendors should propose a Year-1 baseline that supports day-one operations and compliance (e.g., Microsoft 365/RingCentral integrations, RBAC, accessibility, security baselines), with remaining capabilities sequenced for later phases based on discovery outcomes. And if possible, the subsequent capabilities for year 2 and 3.] Year 1 needs to have Problem Management, Incident Management, and Request Management. Year 2 and 3 Would be Change Management and Asset Management

The RFP specifies integration targets—including Microsoft 365 (Hybrid/GCC), RingCentral, Active Directory/Entra ID, and discovery tools—but does not enumerate current license inventories in the Q&A. Vendors should assume standard integrations and identify opportunities to leverage CalHFA's existing ecosystem; details will be confirmed during discovery and the Discovery Workbook deliverable.

RFP Section 2.2 — Background

Bringing people home for 50 years, CalHFA has supported the needs of low- and moderate-income renters and homebuyers by providing financing and programs with a focus on equity. Established in 1975, CalHFA was chartered as the state's affordable housing lender. The Agency's Multifamily Lending Division finances affordable rental housing through collaborations with developers, local, state and federal government partners and more, while its Single-Family Division partners with a preferred lender network to provide first-time homebuyers with down payment and closing cost assistance and access to first mortgage loans. CalHFA is a self-supported state agency that doesn't rely on taxpayers' dollars for its operational costs but regularly administers various state and federal resources on behalf of the state.

CalHFA's operating staff environment includes a count of 225 to 240 total employees, of which 31 are IT staff supporting service desk, infrastructure, applications, security, and network operations. Additionally, the Agency has on average 20 Administrative and Marketing personnel who require specialized role-based access controls due to their involvement in staffing-related workflows and sensitive operational content. These population details must be used by vendors to ensure accurate licensing estimates, workflow segmentation, Artificial Intelligence (AI) consumption forecasting, and staffing recommendations.

CONSOLIDATED QUESTION GROUP — Section 2.2

VENDORS & VARIATIONS:

Question: §2.2; p10, §3.8 – Licensing and Pricing Assumptions: To enable vendors to develop accurate and comparable three-year TCO pricing, can CalHFA provide its current or estimated counts for ITSM fulfiller/agent users by role, anticipated monthly or annual ticket volumes, number of service catalog items, endpoint/device counts subject to discovery, anticipated AI/Virtual Agent transaction volumes, required non-production environments, and the approximate number of integration endpoints? If these quantities are not yet known, please identify the assumptions vendors should use for proposal pricing.

Question: Sec. 2.2: ITSM Users — The RFP identifies approximately 31 IT staff. Please provide the anticipated number of users requiring full/fulfiller/agent licenses versus requester/end-user access.

Question: Sec. 2.2: Administrative/Marketing Users — The RFP identifies approximately 20 Administrative and Marketing personnel requiring specialized role-based access. Please clarify whether these users are expected to be licensed as fulfillers/agents, requesters, case users, or another user type.

Question: Sec. 2.2: Total End Users — Please confirm whether all 225–240 employees should be considered potential ITSM requesters/end users.

Question: Sec. 2.2: Portal Users — Should the self-service portal be accessible to all 225–240 employees, or only designated users?

Question: Page 2, Section 2.2 – Background For licensing purposes, please confirm the anticipated number of users requiring agent/fulfiller access at initial Go-Live. Of the 31 IT staff and approximately 20 Administrative/Marketing personnel identified, how many are expected to create, update, assign, or fulfill tickets/work items versus accessing the platform solely as requesters/end users or approvers?

Question: Section 2.2 identifies approximately 20 Administrative and Marketing personnel requiring restricted access to staffing-related workflows. Please describe the staffing-related requests, workflows, and sensitive data expected to be supported, and indicate whether these are existing processes to be migrated or new processes to be implemented.

CONSOLIDATED RESPONSE

Section 2.2 provides the current staffing ranges (225–240 total employees; approximately 31 IT staff; approximately 20 Administrative/Marketing users with specialized RBAC), which vendors must use when formulating licensing, workflow segmentation, AI consumption forecasting, and staffing recommendations. Vendors should propose right-sized, clearly stated pricing assumptions and include sensitivity/variability factors; final quantities will be validated post-award. Any information that is not disclosed will be confirmed during discovery and documented in the Discovery Workbook and related deliverables (Section 3.8).

CalHFA will confirm user licensing mix during discovery. At proposal stage, vendors should assume a subset of the approximately 31 IT staff will require agent/fulfiller licenses to support service desk, infrastructure, applications, security, and network operations, with the remainder as requesters/approvers as appropriate to the proposed model; exact counts will be finalized in planning.

Section 2.2 notes specialized role-based access controls for Administrative/Marketing personnel due to staffing-related workflows and sensitive content. If your licensing model considers Administrative/Marketing staff must be fully licensed fulfillers/agents, then you must disclose this in your proposal. CalHFA will determine the appropriate license type(s) (e.g., requester, approver, or case-workflow roles) during discovery; vendors should propose a compliant RBAC design aligned with the restrictions in Section 3.2.1.

For planning and licensing purposes, vendors may assume the 241 employees constitute the potential requester/end-user population, subject to final validation in discovery. Role-based segmentation and access scope will be confirmed during configuration and RBAC design.

Vendors should design the portal to support CalHFA's end-user population as described in Section 2.2, with final audience, personas, and visibility refined during discovery and configuration of the self-service capabilities (see Section 3.1.3 for portal requirements).

As mentioned in Section 2.2, there are approximately 31 IT staff; approximately 20 Administrative/ Marketing users with specialized RBAC. Vendors should disclose the

types of licenses that are available with the product/solution. It should be assumed that IT staff are agent/fulfiller licenses to support agency workforce. Based off vendor licensing models, should propose the types of licenses that should be assigned to Administrative/Marketing staff that are involved in staffing workflows.

Section 2.2 notes the existence of staffing-related workflows and sensitive content that require specialized role-based access but does not enumerate individual request types or data elements. Vendors should plan for controlled, segmented access consistent with Section 3.2.1 RBAC and validate specific workflow definitions, data classifications, and migration vs. net-new requirements during discovery workshops (Section 3.6.4).

RFP Section 2.3 — Procurement Process

While CalHFA is exempt from the California Public Contract Code, this procurement will promote fair competition and transparency. CalHFA reserves the right to cancel the RFP, reject proposals, and waive minor irregularities if in the Agency's best interest. Decisions are final and not subject to appeal.

All communications must be directed to itprocurement@calhfa.ca.gov; external engagement with staff may result in disqualification.

Vendors shall not include confidential/proprietary information due to Public Records Act (PRA) exposure; submit sanitized versions when needed.

CONSOLIDATED QUESTION GROUP — Section 2.3

VENDORS & VARIATIONS:

Question: Sections 2.3 and 2.5, printed page 2 (PDF page 4). Is there a publicly available interested-vendor, planholder, or teaming-interest list that prospective subvendors may use? We are requesting only information approved for public release, not confidential proposal or evaluation information.

Question: Section 2.3, Procurement Process: Did CalHFA engage an ITSM software vendor, implementation partner, consultant, or other third party in conducting market research or developing the requirements for this RFP?

CONSOLIDATED RESPONSE

The RFP does not identify or provide an interested-vendor, planholder, or teaming-interest list. CalHFA will publish only the single consolidated Q&A, per Section 2.5, and otherwise does not release vendor-specific information. All communications must occur exclusively through itprocurement@calhfa.ca.gov, and CalHFA will not facilitate external vendor engagement or teaming coordination.

Section 2.3 describes CalHFA's procurement approach, including fairness, transparency, and the Agency's discretion to cancel or modify the solicitation. The RFP does not disclose or identify any external party involved in market research or requirement development. CalHFA does not provide additional information about internal or external contributors. Vendors should rely solely on the published RFP content for purposes of proposal preparation.

Yes, CalHFA engaged a consultant in conducting our market research and creating the RFP.

RFP Section 2.5 — Questions

All vendor questions must be submitted as one consolidated list referencing the RFP page number and section. A single consolidated Q&A will be issued to all vendors. Submit questions electronically to itprocurement@calhfa.ca.gov; subject line: Q&A ITSM System for CalHFA Information Technology Division RFP.

Responses will be posted on [CalHFA's Procurement Opportunities](#) page on or before Monday, September 14, 2026, 5:00 PM PT.

CONSOLIDATED QUESTION GROUP — Section 2

VENDORS & VARIATIONS:

Question: Sec. 2 (dates): Implementation Timeline — The RFP identifies January 4, 2027 as the start of service. Please clarify whether January 4, 2027 represents the implementation project start date, production go-live date, or commencement of the overall contract/services period."

Question: Is CalHFA expecting the ITSM platform to be fully operational by a specific date following the January 4, 2027 service commencement date? If so, please provide the required target go-live date."

CONSOLIDATED RESPONSE

With the updated RFP, Monday, January 11, 2027, is the Start of Service milestone.

Go-live timing—will be established through the project plan, milestones, and implementation schedule defined after vendor selection (Section 3.8). Vendors should propose a realistic, right-sized timeline consistent with their methodology; CalHFA will validate and approve final dates during planning.

RFP Section 3 — Scope of Work

CalHFA has identified the need to replace its current home-grown incident and request tracking system with a modern, scalable ITSM solution that aligns with the agency's growth and evolving technology requirements, reduces manual handoffs, and improves service quality and responsiveness.

CalHFA requires the following services to help meet the aforementioned need: The selected vendor must implement an Information Technology Infrastructure Library (ITIL) v4-based ITSM platform that is Federal Risk and Authorization Management Program (FedRAMP)-compliant, integrates with Microsoft 365 (Hybrid/Government Community Cloud (GCC)) and RingCentral, supports multi-channel intake (portal, email, phone, APIs), SLA-driven workflows with escalation and notifications, a configurable Service Catalog, knowledge management, asset lifecycle management, and executive dashboards/KPIs for visibility and operational decision-making. The selected vendor will also be expected to assist CalHFA in the modification of its existing processes and procedures to more closely align with ITIL best practices.

These services will require the selected vendor to deliver comprehensive ITSM implementation with the following detailed capabilities, configurations, and deliverables.

CONSOLIDATED QUESTION GROUP — Section 3

VENDORS & VARIATIONS:

Question: Are discrete data-migration validation, integration-test automation, or technical-documentation work packages permissible under the selected prime, subject to all applicable security and personnel requirements? This question does not propose a replacement platform or a deviation from the RFP's platform requirements.

Question: Page 3 – Section 3, Scope of Work: Does CalHFA have a preferred ITSM software platform or technology ecosystem, or should vendors propose the platform they believe best satisfies the requirements?

Question: Section 3, Term: What is the anticipated base contract term, and are any renewal or option periods contemplated?

Question: Sec. 3: Year 1 Scope — Please confirm whether all capabilities listed in Section 3 are required to be fully implemented and operational in Year 1, or whether vendors may propose certain capabilities for Years 2–3 based on prioritization and business value.

Question: Sec. 3 (intro): FedRAMP Authorization — Please specify the required FedRAMP authorization level and whether CalHFA requires the specific proposed SaaS environment/service offering to hold the authorization.

Question: Sec. 3 (intro): FedRAMP Boundary — Does CalHFA require all components, integrations, AI services, connectors, and third-party services used in the proposed architecture to fall within the applicable FedRAMP authorization boundary?

Question: Sec. 3 (M365): GCC Environment — Please specify the exact Microsoft 365 environment used by CalHFA, including whether the organization operates in commercial Microsoft 365, GCC, or GCC High.

Question: RFP Page 3, Section 3 – Scope of Work The RFP indicates that the current home-grown solution requires extensive manual processes and that the new solution should reduce manual handoffs. Please provide examples of the key manual handoffs or processes CalHFA would most like to automate or improve.

CONSOLIDATED RESPONSE

Vendors should propose the platform that best meets the requirements and integrations listed in Section 3, and CalHFA will evaluate proposals against those criteria.

The RFP does not specify a fixed term length. The draft of the Service Agreement includes a Term provision with dates to be completed during contract formation; renewal/option periods, if any, would be addressed as part of final negotiations and award.

CalHFA seeks right-sizing to avoid overbuying; sequencing will be validated during discovery and planning and documented in the project plan and deliverables.

Year 1: Incident Management, Request Management, Problem Management, Year 2 Change Management, Year 3: Asset Management. However, CalHFA will determine the prioritization and final planning during discovery.

Yes

CalHFA does not require all proposed architecture to be Fed RAMP compliant (M365) CalHFA operates in GCC.

CalHFA current solution requires manual transfer multiple tasks to internal teams and manual SLA monitoring. The new system should be configured to automate transfer of tasks upon completion. SLAs should be automatically tracked upon ticket submission.

Processes:

Onboarding/Offboarding request– multiple units involved for resolution

Urgency/Severity – system should help determine at time of submission

Move -Add -Change – multiple units involved for resolution

New Software request – currently in Microsoft Forms, should be a part of the new system, including submission – review – fulfillment.

SLAs – should be monitored at time of submission, with automated breach warning and alerts to assigned staff; also tracked via an executive dashboard.

RFP Section 3.1.1 — Incident, Request, and Problem Management

- Support multichannel intake (portal, email, phone, Application Programming Interfaces (APIs)).
- Provide automated categorization, routing, prioritization, and SLA tracking.
- Deliver configurable workflows with escalations, notifications, and SLA breach alerts.
- Enable problem identification, root cause analysis, and linkage across incidents, problems, and known errors.
- Support workaround documentation and seamless knowledgebase updates.
- Must demonstrate Major Incident Management: governed escalation paths, broadcast notifications, stakeholder communication plans, Microsoft Teams channels, dashboards, and post-incident Root Cause Analysis (RCA) documentation.
- Support Artificial Intelligence (AI)-based duplicate detection, clustering, and automated linkage to known errors.
- Support event-driven automated incident creation from monitoring tools, cloud alerts, endpoint telemetry, security tooling, and API integrations.
- All intake channels must support secure Open Authorization (OAuth) 2.0 or JSON Web Token (JWT)-based authorization.

CONSOLIDATED QUESTION GROUP — Section 3.1.1

VENDORS & VARIATIONS:

Question: 3.1.1. Incident / Request / Problem / Change Approximate number of incidents per month? Approximate number of service requests per month? Approximate number of changes per month? Approximate number of problems per month? How many assignment groups are expected? How complex is incident categorization/routing? Approximately how many Major Incidents are declared annually, and are existing Major Incident Management escalation and communication procedures available for implementation? Approximately how many Change Management workflows/change models and CAB variations are expected in Year 1? Approximately how many non-catalog automated workflows or custom process flows are expected in Year 1?"

Question: 3.1.1. and 3.1.2. SLA / OLA / XLA Approximately how many SLA definitions are required? How complex are SLA calculations? Approximately how many OLA definitions are required in Year 1? Which XLA capabilities should be included in Year 1? Are existing SLA definitions available?"

Question: 3.1.1. Integrations How many integrations are required in Year 1? Beyond the RFP-identified integrations, what additional systems must be integrated in Year 1? What type of integration is generally required? How complex are the integrations? Are APIs

available for all systems? Is middleware/iPaaS currently available? Are integration SMEs available from CalHFA? Are integration specifications/documentation available?"

Question: Incident Management: Please identify which specific monitoring and security tools are in production at CalHFA today (e.g., Microsoft Sentinel, Defender, SolarWinds, Nagios, Dynatrace, Intune alerts) so we can confirm native connector availability vs. custom integration scope."

CONSOLIDATED RESPONSE

Incidents 225-250\month, Service Request 25-50\month, Changes: 10-15\month
Assignment Groups: 10, Incident Categorization is complex between multiple teams
At least 2-5 Major incidents are declared annually; escalation and communication procedures are available for implementation. Change Management workflows\change models and CAB variations must be discussed. Non-catalog automated workflows or customer processes will require more discussion on our end.

At least 5 to begin and more to be added in Year 1. SLA calculations are based on initial submission time and severity vs impact. OLA and XLA capabilities are to still be determined for Year 1. Actual SLA definitions will be shared with the selected vendor.

Integrations required for Year 1 will be determined during the initial discovery period for Year 1.

CalHFA monitoring and security tools will be shared with the selected vendor during discovery.

RFP Section 3.1.2 — Service Level, Experience Level, and Operational Level Management

- Define, track, and report SLAs, Operational Level Agreements (OLAs), and Experience Level Agreements (XLAs).
- Provide real time SLA dashboards and analytics.
- Send automated notifications and escalations as thresholds are approached or breached.
- Vendor must support XLA sentiment scoring, user feedback ingestion, and persona-based dashboards.

CONSOLIDATED QUESTION GROUP — Section 3.1.2

VENDORS & VARIATIONS:

Question: 3.1.2 SLA OLA: Does CalHFA have existing documented SLA targets for incident response and resolution?"

CONSOLIDATED RESPONSE

Yes, documented SLAs and desired targets will be shared with the selected vendor during discovery and project planning.

RFP Section 3.1.3 — Self -Service Portal

- Offer intuitive self-service capabilities for submitting incidents, requests, and searching knowledge.
- Provide real time ticket visibility, updates, notifications, and status tracking.
- Support role-based dashboards and personalization.
- Portal must support queue visibility, ticket subscription, and multilingual support.

CONSOLIDATED QUESTION GROUP — Section 3.1.3

VENDORS & VARIATIONS:

Question: 3.1.3 Self Service Portal: The RFP requires multilingual support for the self-service portal (§3.1.3). Which languages beyond English are required? Is this a Year 1 or Years 2–3 requirement?"

Question: Section 3.1.3 – Self-Service Portal Does CalHFA currently provide a self-service portal for end users? If so, please briefly describe its current use and any content or functionality expected to be migrated to the new platform."

CONSOLIDATED RESPONSE

Additional language - Spanish

Yes, we have an end-user intake system that prompts users to provide information about the IT service request they are submitting.

RFP Section 3.1.4 — Case Management for Enterprise & IT -Adjacent Workflows

- Support non-IT business process workflows (e.g., Human Resources (HR), Finance).
- Enable integration/automation to reduce reliance on external workflow tools.
- Strict role-based data segmentation (e.g., HR confidentiality), autonomous departmental workflow configuration, onboarding/offboarding orchestration.

CONSOLIDATED QUESTION GROUP — Section 3.1.4

VENDORS & VARIATIONS:

Question: Sec. 3.1.4: Non-IT Workflows — Please identify the specific HR, Finance, Administrative Facilities, or other non-IT workflows that CalHFA expects to implement.

Question: 3.1.4. 3.3.4 AI & Automation Which AI capabilities are required in Year 1? How many Virtual Agent use cases are expected? Beyond the RFP-required password reset, MFA unlock, routing, and live-agent handoff, what additional Virtual Agent use cases should be included in Year 1? What percentage of interactions are expected to be automated? Are AI features required to operate on CalHFA-restricted data? Is human approval required for AI-generated actions? Are existing AI/automation tools already in use?

Question: 3.1.4 Case management and IT-Adjacent workflows: What external workflow tools are currently in use for HR and Finance workflows that this platform is expected to replace or integrate with?

Question: 3.1.4 Case management and IT-Adjacent workflows: What is the expected monthly volume of non-IT (HR/Finance) cases? This determines whether ESM licensing is needed and at what scale.

Question: 3.1.4 Case management and IT-Adjacent workflows: Will HR case data reside in the same platform instance as IT service management, or will a separate instance/environment be required for HR workflows?

Question: SECTION 3.1.4, CASE MANAGEMENT FOR ENTERPRISE AND IT-ADJACENT WORKFLOWS (PAGE 4) Are the HR and Finance examples intended as illustrative future use cases, or are specific non-IT case management workflows expected to be implemented as part of the initial project? If implementation is expected, please identify the departments, business processes, and approximate number of workflows or case types in scope."

Question: SECTION 3.1.4, CASE MANAGEMENT FOR ENTERPRISE AND IT-ADJACENT WORKFLOWS (PAGE 4) For the HR and Finance workflows referenced, does CalHFA expect bidders to propose general-purpose configurable workflow and case management capabilities, or should bidders assume that specialized HR, Finance, or other product-specific modules may be required?

Question: SECTION 3.1.4, CASE MANAGEMENT FOR ENTERPRISE AND IT-ADJACENT WORKFLOWS (PAGE 4) Please clarify the intended scope of onboarding and offboarding orchestration. Is the requirement limited to IT fulfillment activities such as identity, access, applications, and equipment, or is CalHFA seeking an end-to-end process spanning HR, IT, Facilities, Finance, and other departments?

Question: SECTION 3.1.4, CASE MANAGEMENT FOR ENTERPRISE AND IT-ADJACENT WORKFLOWS (PAGE 4) Please identify the external workflow, forms, and approval tools in use today, for example Power Automate, Power Apps, SharePoint workflows, Microsoft Forms, Nintex, Smartsheet, DocuSign, or Adobe Sign. Please also confirm whether retirement or decommissioning of any named tool is an in-scope objective, a contractual deliverable, or a measured success criterion for this engagement.

Question: Reference Sections 3.1.4 and 3.2.1, pages 4 to 6: Please clarify the required degree of separation for sensitive non-IT case data. Is role-based and access-control-based segmentation within a single production instance acceptable, or does CalHFA require stronger isolation such as domain separation or a separate instance?

Question: Sections 3.1.4 and 4.2.3, pages 4 and 12: Are non-IT case workers in HR, Finance, and other departments expected to be licensed at the same level as IT fulfillers? Should bidders include full case management licensing for these users in the base proposal, or present it as a separately identified optional line item?

CONSOLIDATED RESPONSE

There are Onboarding and Offboarding HR workflows that CalHFA expects to implement.

No AI capabilities required in Year 1, no Virtual Agent use cases expected as well. No percentage of interactions are expected to be automated in Year 1. AI features aren't required to operate on CalHFA-restricted data. Human approval is not required for AI-generated actions. CalHFA uses Microsoft CoPilot.

Power Automate is used for HR workflows. No plans for replacement at this point. Other non-IT workflows will be discussed with the selected vendor during the discovery phase.

Volume varies but can be up to 25-50 non-IT cases.

This will be shared with the selected vendor during discovery.

There will be some non-IT workflows planned for implementation in Year 1. Actual departments, business processes, number and scope will be disclosed to the selected vendor during discovery and project planning.

CalHFA will expect bidders to propose potential workflows based on best practices and industry standards.

The scope will include multiple divisions, but CalHFA is open to recommendations based on best practices\industry standards.

The actual specific tools in use at CalHFA will be shared with the selected vendor. Retirement or decommissioning of any existing tool will need further discussion.

The required degree of separation and necessary internal requirements will be discussed with the selected vendor.

There may be specified staff in non-IT areas designated to be licensed at the same level as IT fulfillers. We will determine actual licensing with the selected vendor and address during discovery.

RFP Section 3.1.5 — Change and Release Management

- Support standard, normal, and emergency change workflows.
- Provide automated impact analysis, risk scoring, and Configuration Item (CI) dependency checks.
- Provide Change Advisory Board (CAB) scheduling, voting, approvals, and electronic signoff.
- Support structured release planning and release governance workflows.
- Vendor must support Continuous Integration / Continuous Deployment (CI/CD) pipeline integration (Azure DevOps, GitHub Actions, GitLab CI), enabling automated change record creation.
- System must support change collision detection, standardized change models, and automated approval workflows.

CONSOLIDATED QUESTION GROUP — Section 3.1.5

VENDORS & VARIATIONS:

Question: 3.1.5 Change and Release Management: The RFP requires CI/CD pipeline integration supporting Azure DevOps, GitHub Actions, and GitLab CI (§3.1.5). Which of these three platforms is CalHFA currently using, or does the requirement anticipate supporting all three?"

CONSOLIDATED RESPONSE

CalHFA is currently using Azure DevOps with the planned expansion to GitHub actions.

CalHFA currently uses Azure DevOps for CI/CD. The RFP's requirement to support Azure DevOps, GitHub Actions, and GitLab CI is intended to ensure the selected ITSM platform can integrate with CalHFA's present environment and also accommodate future expansion or changes in DevOps tooling if needed. Vendors should design and price CI/CD integration capabilities based on the RFP requirements, and CalHFA will finalize the specific integrations with the selected vendor during discovery and project planning.

RFP Section 3.1.6 — Asset, Configuration, and Configuration Management Database (CMDB) Management

- Provide a federated CMDB with CI lifecycle tracking.
- Support automated and manual dependency mapping.
- Enable service impact analysis for incidents, change, and release workflows.
- CMDB scope must focus on applications, infrastructure services, SaaS platforms, and business services. Workstation inventories must remain in authoritative external systems.
- Discovery integrations must include Intune, network discovery tools, cloud discovery systems, and security tooling.
- The asset inventory and discovery scope includes CalHFA's workstation, laptop, and mobile endpoints, and the vendor must ensure that pricing for all endpoint-based discovery modules is fully disclosed in Pricing.

CONSOLIDATED QUESTION GROUP — Section 3.1.6

VENDORS & VARIATIONS:

Question: Section 3.1.6, Asset, Configuration, and CMDB Management: Approximately how many CIs, applications, business services, servers, network devices, SaaS platforms, cloud resources, and other assets are expected to be represented or discovered?

Question: Sections 3.1.6, 3.2.1, and 3.2.3, which Microsoft 365 GCC, RingCentral, Intune, monitoring, security, discovery, and CI/CD integrations are required at initial go-live, and may API-based integrations satisfy the requirement where a native connector is unavailable?

Question: 3.1.6: CMDB Scope — Please provide the current inventory of applications, infrastructure services, SaaS platforms, and business services that CalHFA expects to populate into the CMDB.

Question: 3.1.6: CI Volumes — Please provide estimated numbers of CIs by class, including servers, applications, databases, network devices, SaaS services, business services, and other CIs.

Question: 3.1.6: Endpoint Inventory — The RFP states that workstation inventories must remain in authoritative external systems. Please confirm which systems are considered authoritative for workstation, laptop, and mobile endpoint inventory.

Question: 3.1.6. CMDB - Approximately how many CIs are expected in the CMDB?

Question: 3.1.6. CMDB - For the RFP-identified CMDB scope (applications, infrastructure services, SaaS platforms, and business services), approximately how many CIs are expected by class, and are any additional CI classes in scope?

Question: 3.1.6. CMDB - Which authoritative external system(s) currently maintain workstation, laptop, and mobile endpoint inventory, and what synchronization frequency is expected with the proposed ITSM platform?

Question: 3.1.6. CMDB - How many CMDB data sources need to be integrated?

Question: 3.1.6. CMDB - Which specific products/tools will provide discovery data for the RFP-required Intune, network, cloud, and security discovery integrations?

Question: 3.1.6. CMDB - Which discovery domains should be implemented in Year 1?

Question: 3.1.6. CMDB - Which applications, business services, or technical services are the highest priority for dependency mapping in Year 1?

Question: 3.1.6. CMDB - Approximately how many business/technical services require dependency mapping?

Question: 3.1.6. CMDB - How mature is the existing CMDB data? Is CMDB data cleansing required?

Question: 3.1.6. CMDB - Are CI relationships already available?

Question: 3.1.6. CMDB - Are existing CI lifecycle states, ownership rules, and CMDB governance standards available for configuration?"

Question: 3.1.6. Asset Management - Approximately how many IT assets need to be managed?

Question: 3.1.6. Asset Management - Which asset types are in scope?

Question: 3.1.6. Asset Management - Is asset data being migrated from an existing system?

Question: 3.1.6. Asset Management - Is software/SaaS asset management required?

Question: 3.1.6. Asset Management - Which hardware asset lifecycle stages are expected in Year 1?

Question: 3.1.6 Asset, Configuration, and CMDB Management: What network discovery tools are currently in production (e.g., SolarWinds, PRTG, Nmap-based tools, or others referenced in §3.1.6)?

Question: Pages 4–6, Sections 3.1.6, 3.2.1 and 3.2.3 – Integrations In addition to Microsoft 365, RingCentral, Intune, and Entra ID, are there other systems or integration points that CalHFA expects to integrate with the ITSM platform? If so, please identify which are required for initial Go-Live versus future phases.

Question: Section 3.1.6 – Asset, Configuration, and CMDB Management Please identify the network discovery, cloud discovery, security tooling, or other asset/discovery solutions

currently in use or planned for implementation that CalHFA expects to integrate with the ITSM platform.

Question: SECTION 3.1.6, ASSET, CONFIGURATION, AND CMDB MANAGEMENT (PAGE 4)
The RFP states that workstation inventories must remain in authoritative external systems while also including workstations, laptops, and mobile endpoints within the asset and discovery scope. Should endpoint configuration items and assets be represented in the ITSM platform using data federated or synchronized from those authoritative systems, or should endpoint data remain external and be surfaced only when required for ITSM processes?

Question: Reference SECTION 3.1.6, ASSET, CONFIGURATION, AND CMDB MANAGEMENT (PAGE 4) Please identify the existing authoritative systems expected to provide CMDB, discovery, asset, and telemetry data, including Intune, network discovery, cloud discovery, security tools, asset repositories, and application inventories.

Question: SECTION 3.1.6, ASSET, CONFIGURATION, AND CMDB MANAGEMENT (PAGE 4) Is CalHFA seeking comprehensive hardware and software asset lifecycle capabilities, including procurement, inventory and stockroom, assignment, reclamation, contract and license management, and disposal, or primarily asset visibility sufficient to support ITSM and CMDB processes?

Question: SECTION 3.1.6, ASSET, CONFIGURATION, AND CMDB MANAGEMENT (PAGE 4)

Question: Reference Sections 3.1.6 and 3.2.1, pages 4 to 5: Will CalHFA permit deployment of a vendor-provided on-premises discovery collector or integration server inside its network? If so, please confirm who provisions and maintains the host, and the permissible operating system and sizing.

Question: Sections 3.1.6 and 3.2.1, pages 4 to 5: Does CalHFA require top-down automated business service mapping, which is a separately licensed capability on most platforms, or are manually maintained configuration item relationships sufficient for the initial implementation?

CONSOLIDATED RESPONSE

CalHFA currently does not use CMDB. The inventory of apps, infrastructure services, etc. will require further discussion with the selected vendor during discovery.

All workstations, laptop and mobile endpoint inventory are currently tracked by authoritative external systems such as SharePoint, SCCM and Intune.

The rest of the details will be discussed at time of discovery with the selected vendor.

CalHFA currently monitors desktops, laptops, mobile phones, peripherals, Poly desk phones, and servers, in the asset inventory list.

RFP Section 3.1.7 — Service Catalog and Request Fulfillment

- Support structured request definitions, routing, conditional logic, and approvals.
- Provide real-time tracking for requesters, technicians, and managers.
- Persona-based item visibility, dynamic form behavior, and automated provisioning workflows.

CONSOLIDATED QUESTION GROUP — Section 3.1.7

VENDORS & VARIATIONS:

Question: Page 5 – Section 3.1.7, Service Catalog and Request Fulfillment; Page 9 – Section 3.6.4, Process Analysis and Improvements: Approximately how many service catalog items and existing IT/non-IT workflows must be configured or redesigned for the initial implementation?

Question: 3.1.7. - Service Catalog Approximately how many Service Catalog items are required for Year 1?

Question: 3.1.7. - How complex are the catalog items?

Question: 3.1.7. - Are existing catalog items available for migration?

Question: 3.1.7. - Will catalog requests require automated provisioning?

Question: 3.1.7. - How many approval levels are typically required?

Question: 3.1.7 Service Catalog: Does the current home-grown system have an existing catalog of request types that can be documented and migrated, or will the catalog be designed from scratch during the ITIL process workshops?"

Question: 3.1.7 Service Catalog: How many catalog items (service request types) does CalHFA expect to configure at go-live? How many are expected to be added in Years 2–3? This directly affects implementation effort."

CONSOLIDATED RESPONSE

The current home-grown system used at CalHFA does not have a formal service catalog. We will need to work with the selected vendor during discovery to formalize one.

RFP Section 3.1.8 — Knowledge Management

- Support full article lifecycle (draft, review, approve, publish, archive).
- Provide analytics for article usage and effectiveness.
- Integrate knowledge natively into ticket workflows.
- Knowledge must support Retrieval Augmented Generation (RAG) AI, multilingual search, relevance tuning, and automated summarization.

CONSOLIDATED QUESTION GROUP — Section 3.1.8

VENDORS & VARIATIONS:

Question: 3.1.8. Knowledge Management Approximately how many knowledge articles need to be migrated? How much new knowledge content needs to be created? Which languages must the knowledge base and multilingual search support? Which AI/RAG-based knowledge capabilities should be included in Year 1?"

Question: SECTIONS 3.1.8 AND 3.1.9, KNOWLEDGE MANAGEMENT AND AI (PAGE 5) Which Knowledge Management and AI capabilities are required for the initial Year 1 production implementation versus the Years 2 and 3 roadmap? Please clarify timing expectations for retrieval-augmented generation, AI summarization, automated classification and routing, duplicate detection, recommendations, virtual assistant, and automated resolution.

CONSOLIDATED RESPONSE

CalHFA does have some knowledge articles available but does not have an existing knowledge base integrated into our current system. New knowledge content needs will require further discussion with the selected vendor during the discovery phase.

Currently, Knowledge management is slated for Year 2, and any AI capabilities will be discussed for Year 3. Timing expectations will depend on the selected vendor's

implementation and will be discussed during the discovery phase.

RFP Section 3.1.9 — Integrated AI and Automation

- Provide Natural Language Processing (NLP) for ticket classification.
- Offer AI based recommendations, virtual assistant support, and deflection capabilities.
- Recommend articles, solutions, and auto-triage based on historical patterns.
- Vendor must disclose full AI consumption pricing (token/credit models), metering rules, rate limits, and future cost escalators.
- Virtual agent must support password resets, Multi-Factor Authentication (MFA) unlocks, routing, and live-agent handoff.

CONSOLIDATED QUESTION GROUP — Section 3.1.9

VENDORS & VARIATIONS:

Question: Section 3.1.9, Integrated AI and Automation; Pages 7–8 – Section 3.3.4, AI/ML/NLP/RAG/GenAI Governance: Are AI, RAG, summarization, NLP classification, recommendations, and virtual agent capabilities mandatory at initial go-live, or may these capabilities be phased into later roadmap years?

CONSOLIDATED RESPONSE

These capabilities can be reviewed during the discovery phase but will most likely be phased into later roadmap years.

RFP Section 3.2.1 — Platform Scalability and Integration

- Integrate with Microsoft 365 (Hybrid/GCC), RingCentral, Active Directory/Entra ID (Hybrid/GCC), and CalHFA enterprise systems.
- Support extensible workflow development and secure application architecture.
- Provide availability, resiliency, and uptime SLAs suitable for enterprise operations.
- Provide supported Microsoft Graph API endpoints; Teams integration capabilities; GCC limitations.
- Provide validated RingCentral Computer Telephony Integration (CTI) capabilities: screen pop, call logging, Interactive Voice Response (IVR) routing, presence sync.
- Role-Based Access Control (RBAC) must support granular segmentation that restricts Admin/Marketing staff to only the staffing-related instances, requests, and workflows they are authorized to view. The platform must prevent access to ITSM functions containing sensitive internal operations, security activities, or IT service data for these user groups.

CONSOLIDATED QUESTION GROUP — Section 3.2.1

VENDORS & VARIATIONS:

Question: Pages 5–6 – Sections 3.2.1 and 3.2.3, Platform Scalability and Integration / Native Connectors: Can CalHFA provide the complete list of required production integrations, including the specific Microsoft, RingCentral, monitoring/security, DevOps, and other enterprise systems in scope?

Question: 3.2.1: RingCentral Version — Please provide the specific RingCentral product/edition currently deployed by CalHFA.

Question: 3.2.1: CTI Scope — Please clarify which RingCentral CTI functions are mandatory at go-live: screen pop, call logging, IVR routing, presence synchronization, or other functions.

Question: Reference 3.2.1. and 3.3 Security, Compliance & RBAC -

Question: Reference 3.2.1. and 3.3 Security, Compliance & RBAC - What types of restricted/sensitive data will be stored in the proposed ITSM platform?

Question: Reference 3.2.1. and 3.3 Security, Compliance & RBAC - How complex are role-based access requirements?

Question: Reference 3.2.1. and 3.3 Security, Compliance & RBAC - Which staffing-related applications, requests, workflows, and data must be isolated for the approximately 20 Administrative/Marketing users identified in the RFP?

Question: Reference 3.2.1. and 3.3 Security, Compliance & RBAC - Are there specific security approval/ATO requirements before deployment?

Question: Reference 3.2.1. and 3.3 Security, Compliance & RBAC - Does CalHFA require a project-specific penetration test and/or vulnerability assessment before production go-live, in addition to the platform/vendor security evidence required by the RFP?

Question: Reference 3.2.1. and 3.3 Security, Compliance & RBAC - Are there additional CalHFA-specific security controls beyond the RFP requirements?

Question: 3.2.1 Platform and Integration: Is CalHFA's Microsoft 365 environment a pure GCC (Government Community Cloud) tenant, or a hybrid deployment with some commercial M365 licensing? This has significant implications for supported Microsoft Graph API endpoints and Teams integration capabilities.

Question: Page 5, Section 3.2.1 – Platform Scalability and Integration Please describe CalHFA's current Microsoft 365 and Entra ID environment, including which workloads operate in GCC versus commercial/hybrid environments, and identify the Microsoft integrations required for initial Go-Live.

Question: Page 5, Section 3.2.1 – Platform Scalability and Integration Please describe CalHFA's current RingCentral environment and the RingCentral use cases expected for initial Go-Live, including requirements for screen pop, call logging, IVR routing, and presence synchronization."

Question: SECTION 3.2.1, PLATFORM SCALABILITY AND INTEGRATION (PAGE 5) Please provide additional information regarding CalHFA's Microsoft environment, including the Microsoft 365 GCC tier, Entra ID and Active Directory architecture, Teams, Intune, and any known Microsoft Graph or API restrictions that the selected solution must accommodate.

Question: Sections 3.2.1 and 3.8, pages 5 and 10: Please provide a consolidated list of the CalHFA enterprise systems expected to be integrated in the initial implementation, identifying for each the system name, the integration direction, the anticipated pattern such as API, file, or event, and whether the integration is required at go-live or is a Years 2 to 3 roadmap item."

CONSOLIDATED RESPONSE

CalHFA does not require a project specific pen test or vulnerability assessment

CalHFA is a GCC tenant, even if there are some commercial spaces they still fall under the GCC boundary.

RFP Section 3.2.3 — Native Connectors

- Provide a list of native connectors for common Software as a Service (SaaS) and on-premises applications, especially those relevant to CalHFA, including but not limited to Microsoft 365 (Hybrid/GCC), RingCentral, Active Directory/Entra ID, HR/Facilities case systems, and monitoring tools.
- A complete catalog of available connectors, including the connector name, supported integration pattern, and authentication type.
A pricing breakdown identifying which connectors are included with the base license, which require add-on (Stock Keeping Units) SKUs, and which use consumption-based pricing.

CONSOLIDATED QUESTION GROUP — Section 3.2.3

VENDORS & VARIATIONS:

Question: 3.2.3. - Microsoft 365 / Entra / RingCentral Which Microsoft 365 integration use cases should be implemented in Year 1?

Question: 3.2.3. - For Entra ID/Active Directory integration, what are the current identity source-of-truth, group structure, and provisioning requirements CalHFA expects the vendor to integrate with?

Question: 3.2.3. - What RingCentral product/edition is currently deployed, and are CTI/API/IVR integration interfaces enabled for the RFP-required screen pop, call logging, IVR routing, and presence synchronization?

Question: 3.2.3. - Are there known Microsoft GCC tenant restrictions, approval requirements, or Microsoft Graph/Teams limitations the vendor should account for?

CONSOLIDATED RESPONSE

The product should be able to integrate with M365.
Vendors should evaluate their product limitations as it pertains to the GCC environment.
The RingCentral API integration is well documented on their website.

RFP Section 3.2.5 — Data Storage, Residency, and Sharing Controls

- Support rollback, disaster recovery, backup, and data extraction/eradication.
- Provide granular external sharing controls with full disablement options.
- Ensure data residency within the continental United States.
- Provide an annually updated sub processor list; notify CalHFA 30 days before changes.
- Provide official data residency attestation.

CONSOLIDATED QUESTION GROUP — Section 3.2.5

VENDORS & VARIATIONS:

Question: Sections 3.2.5 and 3.3.3, does “FedRAMP-compliant” require the proposed production environment to hold a current FedRAMP authorization and be listed in the FedRAMP Marketplace, and if so, at what impact level? Please also confirm whether both SOC 2 Type II and ISO 27001 certifications must be current as of the proposal deadline.

Question: §3.2.5 and 3.3 – FedRAMP and Microsoft GCC Requirements: Please clarify the required FedRAMP authorization level (e.g., Low, Moderate, or High) and whether the proposed production platform and all associated AI, integration, and data-processing services must operate within the applicable FedRAMP-authorized boundary. Please also confirm whether CalHFA's Microsoft environment is GCC or GCC High.

Question: Section 3.2.5 – Data Storage, Residency, and Sharing Controls Please clarify what is meant by “granular external sharing controls with full disablement options” and, if possible, provide examples of the external sharing scenarios CalHFA expects the solution to control or prohibit.”

CONSOLIDATED RESPONSE

CalHFA does not mandate any of the above compliance, but it is a plus if the vendor has them.

CalHFA is a GCC tenant. AI pieces must comply with State of California risk assessments

RFP Section 3.2.8 — Mobile Experience

- Provide native mobile apps for ticket submission, approvals, knowledge, dashboards, notifications.

CONSOLIDATED QUESTION GROUP — Section 3.2.8

VENDORS & VARIATIONS:

Question: Section 3.2.8, Mobile Experience: Is a native mobile application an absolute requirement, or would a fully responsive and mobile accessible browser experience satisfy CalHFA's mobile requirement?

CONSOLIDATED RESPONSE

Not an absolute requirement, a fully responsive mobile accessible browser will satisfy this requirement.

RFP Section 3.3.4 — AI, ML, NLP, RAG, and Generative Artificial Intelligence (GenAI) Governance Requirements

- Disclosure of all AI, ML, NLP, RAG, and GenAI features included in the proposed solution, including identification of any third-party AI services. Support 3rd-party pen-testing; share sanitized results.
- Certification that CalHFA data will not be used to train, fine-tune, calibrate, or improve any AI, ML, NLP, RAG, or GenAI models, including anonymized or aggregated data.
- Assurance that CalHFA data is not transmitted to, processed by, or stored within any public Large Language Model (LLM) service (e.g., ChatGPT, Gemini, Claude, or similar consumer-facing tools).
- Implementation of AI and GenAI safety controls, including input validation, output validation, hallucination reduction, and prevention of unauthorized automated actions.
- Logging and auditability of AI-generated actions such as classification, routing, summarization, recommendations, or similar outputs.
- Disclosure of all AI-related sub processors and provision of at least 30 days advance notice before any sub processor change.
- Annual attestation confirming continued compliance with Section 3.3.4 requirements.

CONSOLIDATED QUESTION GROUP — Section 3.3.4

VENDORS & VARIATIONS:

Question: Sec. 3.3.4: AI Features — Please identify which AI/ML/NLP/RAG/GenAI capabilities CalHFA considers mandatory for Year 1 versus optional or future-state capabilities.

Question: Sec. 3.3.4: AI Providers — Please confirm whether CalHFA will accept AI functionality provided through third-party AI model providers if the processing occurs within the approved security/data-residency boundary.

Question: Sec. 3.3.4: Public LLM Restriction — The RFP prohibits CalHFA data from being transmitted to, processed by, or stored within public LLM services. Please clarify whether enterprise/private instances of commercial LLM services are acceptable where contractual and technical controls prohibit model training and maintain required data residency.

Question: Sec. 3.3.4: AI Model Training — Please confirm whether the prohibition on using CalHFA data for training, fine-tuning, calibration, or improvement applies only to vendor/third-party models or also to internally hosted models.

Question: Sec. 3.3.4: AI Pricing — Please specify whether CalHFA expects vendors to provide estimated annual AI consumption costs based on forecasted usage or merely unit pricing.

Question: Sec. 3.3.4: AI Consumption Forecast — Will CalHFA provide expected monthly AI interaction volumes for virtual agent, summarization, classification, RAG, and recommendations?

Question: Page 8, Section 3.3.4 – AI, ML, NLP, RAG, and GenAI Governance Requirements
The RFP states that CalHFA data must not be transmitted to, processed by, or stored within any “public Large Language Model (LLM) service,” with examples referring to consumer-facing tools. Please clarify whether “public LLM service” refers specifically to publicly accessible/consumer-facing AI services. Would use of a commercially licensed enterprise LLM/API service satisfy this requirement where CalHFA data is not used for model training or improvement and the service operates within the proposed solution’s compliant security architecture?

CONSOLIDATED RESPONSE

CalHFA would need to discuss the details of this.

If the LLM is specific to CalHFA that is acceptable. Everything else needs to be discussed further. If the internal hosted model is only for use of CalHFA that is acceptable.

RFP Section 3.5 — Reporting & Analytics

- Custom report builder (drag-and-drop).
- Scheduled and automated reporting.
- Configurable export formats (operational, SLA, compliance).
- Real-time dashboards (service, change, performance analytics).
- Export compatibility: Microsoft Power BI, Tableau, Structured Query Language (SQL).
- Digital Experience (DEX) dashboards.

CONSOLIDATED QUESTION GROUP — Section 3.5

VENDORS & VARIATIONS:

Question: 3.5 Reporting & Analytics - How many executive dashboards are expected?

Question: 3.5 Reporting & Analytics - Approximately how many operational reports are required?

Question: 3.5 Reporting & Analytics - For Power BI, Tableau, and SQL compatibility required by the RFP, which require active integration versus export-only capability in Year 1?

Question: 3.5 Reporting & Analytics - Which dashboards must operate in real time at initial go-live, and approximately how many?

Question: 3.5 Reporting & Analytics - Approximately how many custom SLA/XLA/persona/KPI dashboards are expected, and for which personas?

CONSOLIDATED RESPONSE

This will be discussed with the selected vendor during discovery phase.

RFP Section 3.6 — Implementation Services

CONSOLIDATED QUESTION GROUP — Section 3.6

VENDORS & VARIATIONS:

Section 3.6, Implementation Services: May implementation activities be performed remotely, or are any discovery, configuration, testing, training, cutover, hypercare, or support activities required onsite?"

CONSOLIDATED RESPONSE

These activities can be performed remotely, but at Pacific standard time, and with resources within the continent of United States (CoUS).

RFP Section 3.6.2 — Data Migration and Environment Setup

- Extraction, cleansing, validation, mapping, import.
- Configure environments, roles, automation, integrations, workflows.
- Data profiling, reconciliation reports, mock migrations.

CONSOLIDATED QUESTION GROUP — Section 3.6.2

VENDORS & VARIATIONS:

Question: Page 8 – Section 3.6.2, Data Migration and Environment Setup: Approximately how many years and how much historical data must be migrated from the existing system, including incidents, requests, attachments, comments, users, knowledge articles, and other records?

Question: Page 8 – Section 3.6.2, Data Migration and Environment Setup; Page 12 – Section 4.2.3, Proposal Costs: How many development, test, UAT, training, staging, and sandbox environments does CalHFA expect, and is a production-scale/full-copy sandbox required or would an environment using representative data be sufficient?

Question: Section 3.6.2, please provide the current system's technology and available export methods, along with estimated counts and sizes for tickets, requests, users, attachments, knowledge articles, asset records, audit history, and other data to be migrated.

Question: p8, §3.6.2 – Legacy Data Migration: For purposes of estimating migration effort, can CalHFA provide the approximate volume and retention period of data expected to be migrated from the existing home-grown system, including incidents/requests, problems, changes, asset or configuration records, knowledge content, attachments, user records, and other historical data? Please also describe the existing system's available export

mechanisms, APIs, database access, or other methods through which the selected vendor will obtain the source data.

Question: 3.6.2. Legacy Data Migration - The RFP identifies the current solution as home-grown. What technology/database does it use, and what export or API mechanisms are available for migration?

Question: 3.6.2. Legacy Data Migration - Approximately how many historical incidents exist?

Question: 3.6.2. Legacy Data Migration - Approximately how many historical requests exist?

Question: 3.6.2. Legacy Data Migration - How many years of historical data must be migrated?

Question: 3.6.2. Legacy Data Migration - What data needs to be migrated?

Question: 3.6.2. Legacy Data Migration - What is the expected data quality? Is deduplication required during migration?

Question: 3.6.2. Legacy Data Migration - How many legacy systems require migration?

Question: 3.6.2. Legacy Data Migration - Will historical data require transformation/mapping into the proposed ITSM platform data model?

Question: 3.6.2. Legacy Data Migration - How many mock migration cycles should be planned before production migration?

Question: 3.6.2. Legacy Data Migration - Is a parallel run required?

Question: 3.6.2 Data Migration: What is the volume of historical data in the current home-grown system? Specifically: (a) How many historical incident/request records exist? (b) What date range should be migrated? (c) What is CalHFA's minimum retention requirement for historical ticket data?

Question: Page 8, Section 3.6.2 – Data Migration and Environment Setup Please identify the types of legacy data CalHFA expects to migrate (e.g., incidents/requests, users, configuration items, assets, knowledge articles), along with approximate record volumes and the age/history of the data to be migrated.

Question: Page 8, Section 3.6.2 – Data Migration and Environment Setup Are there any regulatory, compliance, legal hold, or records-retention requirements that should be considered when determining the scope and approach for legacy data migration?"

CONSOLIDATED RESPONSE

The current in-grown product is 2.675 GB in size and contains 48,486 service request tickets in a SQL DB server.

Details will be discussed with the selected vendor during the discovery phase.

RFP Section 3.6.3 — Testing and Quality Assurance

- Unit, system, integration, User Acceptance Testing (UAT).
- Resolve defects before production deployment.

CONSOLIDATED QUESTION GROUP — Section 3.6.3

VENDORS & VARIATIONS:

Question: 3.6.3 Testing & Go-Live - How many UAT cycles are expected?

Question: 3.6.3 Testing & Go-Live - Is performance testing required?

Question: 3.6.3 Testing & Go-Live - What security test/remediation acceptance criteria must be satisfied before Go-Live?

Question: 3.6.3 Testing & Go-Live - Does CalHFA require a pilot, or should the vendor recommend whether to use a phased, pilot, or full deployment approach?

Question: 3.6.3 Testing & Go-Live - What hypercare period is expected?

Question: 3.6.3 Testing & Go-Live - How much business/IT SME availability can CalHFA provide during implementation?"

CONSOLIDATED RESPONSE

CalHFA will need to test with various business units; so at least 2 to 3 UAT cycles.

Performance testing is required.

Security testing needs will be determined based on hosting solution proposed by the vendor.

CalHFA will prefer a pilot, but the approach can be tailored based on vendor recommendation.

RFP Section 3.6.5 — Deployment and Transition

- Phased, pilot, or full deployment.
- Go-live hyper-care; post-launch stabilization.

CONSOLIDATED QUESTION GROUP — Section 3.6.5

VENDORS & VARIATIONS:

Question: §§3.6.5–3.7 – Year 1 Scope, Go-Live, and Support Term: CalHFA requires vendors to distinguish Year 1 capabilities from Years 2–3 and identifies January 4, 2027 as the start of service. Please identify which functional capabilities CalHFA considers mandatory for the initial production go-live, the desired production go-live date or implementation timeframe, and the expected duration of post-implementation support to be included in the three-year TCO..

CONSOLIDATED RESPONSE

Year 1: Incident Management, Request Management, Problem Management, Year 2 Change Management, Year 3: Asset Management.

However, CalHFA will determine the prioritization and final planning during discovery.

RFP Section 3.6.6 — Training and Knowledge Transfer

- Training for IT staff, service desk, admins, end users.
- System documentation, admin guides, configuration playbooks.
- CalHFA-specific workflow playbook.

CONSOLIDATED QUESTION GROUP — Section 3.6.6

VENDORS & VARIATIONS:

Question: Section 3.6.6, Training and Knowledge Transfer: Does CalHFA prefer onsite, virtual, or hybrid training, and approximately how many administrators, IT/service desk personnel, managers, and end users are expected to participate?"

Question: 3.6.6 Training - Approximately how many proposed ITSM platform agents/fulfillers require formal training?

Question: 3.6.6 Training - For the RFP-specified training audiences (IT staff, service desk, administrators, and end users), approximately how many participants are expected in each group?

Question: 3.6.6 Training - Is train-the-trainer required?

Question: 3.6.6 Training - What training delivery formats and CalHFA-specific materials are expected?

Question: 3.6.6 Training - Timeline & Implementation Constraints What is the desired implementation duration?

Question: 3.6.6 Training - For planning purposes, should January 4, 2027 be treated as project/service commencement (kickoff) rather than production go-live, and what activities are expected to begin on that date?

Question: 3.6.6 Training - Is there a mandatory Go-Live deadline? Are there blackout periods when implementation/cutover cannot occur?

Question: Page 9, Section 3.6.6 – Training and Knowledge Transfer Please provide CalHFA’s preferred training delivery approach (e.g., remote, onsite, role-based, train-the-trainer) and approximate number of participants by user group, including administrators, service desk/IT staff, managers/approvers, and end users.

CONSOLIDATED RESPONSE

CalHFA prefers Virtual training.
Details to be discussed during discovery phase.

RFP Section 3.7 — Ongoing Support and Continuous Improvement

- Post-implementation support with SLAs.
- Platform updates, release notes, enhancements.
- Regular metrics (quality, capacity, improvement).
- Named support engineers, escalation path, SLAs, quarterly roadmap reviews, 30-day release notices.

CONSOLIDATED QUESTION GROUP — Section 3.7

VENDORS & VARIATIONS:

Question: Section 3.7, Ongoing Support and Continuous Improvement: What duration, operating hours, expected ticket volume, SLAs, and after-hours/on-call requirements should vendors assume for post-implementation support?

CONSOLIDATED RESPONSE

CalHFA business hours are 7 AM to 5 PM PDT.
We will define SLAs for response time with selected vendor.

RFP Section 3.8 — Deliverables

At minimum, the vendor must provide:

- Full project plan and implementation schedule.
- 12–36-month vendor roadmap, including planned releases, improvements, and upgrade cadence. Configured ITSM platform with all required modules.
- Integration packages for Microsoft 365 (Hybrid/GCC), RingCentral, and CalHFA systems.
- Data migration runbooks and validation results.
- Complete training curriculum and knowledge base content.
- Test plans, UAT results, and defect logs.
- Architecture diagrams and security documentation.
- Operational runbooks, SLA dashboards, and reporting packages
- Skills matrix and recommended CalHFA staffing/Full-Time Equivalent (FTE) model required to operate and administer the platform.
- Licensing/use-case discovery questionnaire, including counts of agents, end users, expected ticket volumes, integration endpoints, service catalog scope, and data residency requirements.
- Discovery Workbook containing pricing-impacting details (licenses, environment counts, use cases, monthly volumes, integrations).
- Vendor's ITSM/Enterprise Service Management (ESM) market vision statement.
- Proof-of-Concept (POC) Plan, including success criteria, required integrations, CalHFA data needs, resource commitments, and timeline (if CalHFA elects to conduct a POC).

CONSOLIDATED QUESTION GROUP — Section 3.8

VENDORS & VARIATIONS:

Question: 3.8 ESM Expansion - Which ESM areas are planned for Year 1?

Question: 3.8 ESM Expansion - Which ESM areas are planned for Years 2–3?

Question: 3.8 ESM Expansion - Approximately how many ESM workflows are expected?

Question: 3.8 ESM Expansion - Which ESM workflows/data require strict segregation (for example HR or Finance), and what user groups should have access?

Question: 3.8 ESM Expansion - Technical Architecture & Environments How many proposed ITSM platform environments are required?

Question: 3.8 ESM Expansion - Which environments are required?

Question: 3.8 ESM Expansion - Are there network restrictions affecting integrations?

Question: 3.8 ESM Expansion - Are there special connectivity requirements for on-premises systems?

Question: 3.8 ESM Expansion - What level of HA/DR configuration is required? What are the required RTO/RPO targets?

Question: SECTION 3.8, DELIVERABLES (PAGE 10) The RFP calls for licensing and use case discovery covering volumes and consumption. Please provide available average monthly or annual volumes for incidents, service requests, cases, changes, problems, knowledge searches, virtual agent sessions, and other transactions that may materially affect licensing or AI consumption estimates.

CONSOLIDATED RESPONSE

Besides IT, HR (including Facilities) and Procurement

CalHFA will work with the selected vendor to determine details, during discovery, based on proposed solution.

CalHFA would like for a minimum of two environments - Test and Production.

RFP Section 4.2 — Proposal Content and Format

CONSOLIDATED QUESTION GROUP — Section 4.2

VENDORS & VARIATIONS:

Page 11 – Section 4.2, Proposal Content and Format: Is there a preferred or maximum page limit for the proposal, excluding required forms, resumes, and supporting documentation?"

CONSOLIDATED RESPONSE

No preferred maximum page limit.

RFP Section 4.2.3 — Proposal Costs

- Provide Stock Keeping Unit (SKU)-level pricing, consumption pricing, non-production environments, uplift caps, and three-year Total Cost of Ownership (TCO).

CONSOLIDATED QUESTION GROUP — Section 4.2.3

VENDORS & VARIATIONS:

Question: Page 12 – Section 4.2.3, Proposal Costs: Is there an established budget range, funding ceiling, or internal cost estimate for the ITSM implementation, licensing, and ongoing support?

Question: Page 12 – Section 4.2.3, Proposal Costs: Does CalHFA have a preference for, or place additional value on, vendors offering pricing through a GSA Multiple Award Schedule or another established government contract vehicle?

Question: Sections 2.2 and 4.2.3, please confirm the anticipated contract term and provide estimated counts for named or concurrent agents, administrators, requesters, endpoints, non-production environments, monthly tickets, API transactions, and AI or virtual-agent interactions that vendors should use for comparable three-year pricing.

CONSOLIDATED RESPONSE

CalHFA will not provide a public budget range, funding ceiling, or internal cost estimate for this procurement. Vendors must submit SKU-level pricing, consumption pricing, non-production environments, uplift caps, and a three-year TCO, as specified in Section 4.2.3; CalHFA will evaluate pricing for reasonableness consistent with the proposal procedures and evaluation criteria in the RFP.

CalHFA does not state a preference for any specific procurement vehicle, including GSA schedules. Proposals will be evaluated solely according to the criteria and requirements published in the RFP. Vendors may include pricing available through any contract vehicle if they wish, but the RFP does not assign additional evaluation value or weighting to the use of a particular vehicle.

Final term details will be addressed during contract negotiations and award. Section 2.2 provides staffing ranges—225–240 total employees, approximately 31 IT staff, and approximately 20 Administrative/Marketing personnel with specialized RBAC—which vendors must use when formulating licensing estimates, workflow segmentation, AI consumption forecasting, and staffing recommendations. Additional quantity details (e.g., agent vs. requester counts, endpoint totals, ticket volumes, API transactions, non-production environments, AI/virtual-agent interactions) will be confirmed during discovery and documented within the Discovery Workbook and related deliverables listed in Section 3.8. Vendors should present clear pricing assumptions and any sensitivity/variability factors in their three-year TCO; final quantities will be validated post-award.

RFP Section 4.2.4 — Small Business and DVBE Participation (Exhibit B)

See Exhibit C “Certified Small Business and DVBE Participation.”

- Answer all questions on CalHFA’s provided Response Template.

CONSOLIDATED QUESTION GROUP — Section 4.2.4

VENDORS & VARIATIONS:

Question: 3. Pending small-business certification: "Reference: Section 4.2.4, printed page 12 (PDF page 14); Section 5.2.2, printed page 14 (PDF page 16); Exhibit B. May a subvendor whose California SB/Micro certification is pending be included without claiming certified status or any associated preference? At what point must certification be active for participation to receive consideration? Vendor's application is pending; we are not representing that certification has been granted."

CONSOLIDATED RESPONSE

No, must be certified.

RFP Section 4.2.6 — Agency’s Standard Service Agreement and Optional Forms (Exhibit D)

See Exhibit E Agency’s “Service Agreement.”

- For informational purposes, the terms/conditions within are generally non-negotiable.
- If your company is taking exception to any of the terms or conditions in the Agency’s Service Agreement, please indicate on a separate document titled “Exceptions to Service Agreement” which provision you are objecting to and a detailed description of why you are objecting to the provision.

CONSOLIDATED QUESTION GROUP — Section 4.2.6

VENDORS & VARIATIONS:

Question: RFP Page 12, Section 4.2.6 – Agency’s Standard Service Agreement For a SaaS solution provided through an authorized reseller/implementation partner, will CalHFA permit applicable software publisher subscription terms, service levels, data processing/security terms, and other SaaS-specific terms to be incorporated into or attached to the resulting agreement, subject to CalHFA review?

CONSOLIDATED RESPONSE

CalHFA's Agency Service Agreement governs this procurement, and its terms/conditions are generally non-negotiable. Vendors may submit an "Exceptions to Service Agreement" document identifying specific provisions and rationale for CalHFA's review. Where appropriate, CalHFA may consider attaching SaaS publisher terms (e.g., subscription, SLA, data processing/security) provided they are consistent with and do not conflict with the Agency Service Agreement and the RFP's security, privacy, compliance, accessibility, and requirements. CalHFA reserves the right to decline any proposed terms.

Please include any proposed publisher/reseller terms as an attachment within your proposal and list any requested deviations on a separate document named "Exceptions to Service Agreement" document referenced in Section 4.2.6. CalHFA will evaluate such materials during the review process.

RFP Section 5.1.1 — Minimum Qualifications

- Have at least 10 years of experience conducting the specific type of services required herein and have experience with at least 3 other government (federal, state, local) clients performing like services as described herein or have performed satisfactory work for CalHFA within the past three years.
- Be capable of providing the required services beginning on Monday, January 4, 2027.
- Have the necessary resources, knowledge, skills, experience, and the like to provide the required services.
- Demonstrate the requisite technical proficiency.

CONSOLIDATED QUESTION GROUP — Section 5.1.1

VENDORS & VARIATIONS:

Question: Section 5.1.1, printed page 13 (PDF page 15); Exhibit A, Section II.H, printed page IV (PDF page 20). The RFP requires at least 10 years of relevant experience and experience with at least three government clients, or satisfactory CalHFA work within the prior three years. Does this minimum apply to the proposing prime alone, the combined team, or every sub-vendor separately? May a qualified prime include a newly formed specialist sub-vendor for a tightly defined work package, with the prime retaining full contractual responsibility and demonstrating the required experience?

Question: Sections 5.1.1 and 5.2.2, Minimum Qualifications / Evaluation Criteria: Beyond the minimum government-client experience requirement, does CalHFA place different evaluation significance on government references versus commercial references?

Question: p13, §5.1.1; Exhibit C – Minimum Government Experience Qualification: Section 5.1.1 requires at least 10 years of experience conducting the specific type of services required and experience with at least three federal, state, or local government clients

performing like services. For purposes of satisfying this minimum qualification, must the three government engagements have been performed as the prime contractor and on the same ITSM platform being proposed, or will comparable ITSM implementation work performed as a subcontractor or delivery partner, and/or using another enterprise ITSM platform, satisfy the requirement?

Question: Sec. 5.1.1: For the minimum-qualifications requirement of “3 other government clients performing like services,” must these references specifically reflect ITSM/ITIL platform implementations, or would broader IT services engagements for government clients satisfy this requirement?

CONSOLIDATED RESPONSE

Proposers must demonstrate that the proposal, as submitted, meets the minimum qualifications and that CalHFA can rely on the proposed firm’s capabilities to deliver the contracted services. Subcontracting, if proposed, is subject to prior written consent per the Agency’s Service Agreement, and the prime remains fully responsible for performance. CalHFA will assess organizational qualifications and any proposed teaming in accordance with Sections 5.1 and 5.2 and the Service Agreement’s subcontract provisions.

CalHFA will evaluate proposals based on the criteria set forth in Section 5.2 (Evaluation Criteria), which include ability to perform the tasks, qualifications of personnel, method/techniques, technical compliance with requirements, demonstrated record of success, and reasonableness of fees. The RFP does not assign explicit weighting to government versus commercial references beyond the minimum qualification that requires experience with at least three government clients (or satisfactory CalHFA work within the past three years). Vendors should provide references that best demonstrate relevant, comparable success aligned to the Scope of Work and minimum qualifications; CalHFA will consider references holistically under Section 5.2.

Section 5.1.1 requires “experience with at least 3 other government (federal, state, local) clients performing like services as described herein,” but it does not mandate that those engagements be performed only as the prime nor that they be on the same ITSM platform. CalHFA’s focus is on like services and the proposer’s ability to deliver the Scope of Work. Proposers should document the role (prime vs. subcontractor), the nature of services, and outcomes to demonstrate comparability and proficiency. CalHFA will evaluate relevance under Section 5.2 and the technical compliance to Section 3 requirements.

The RFP’s Scope of Work (Section 3) calls for implementing an ITIL v4-based, FedRAMP-compliant ITSM platform with specified integrations and capabilities; Section 5.1.1 requires experience performing like services as described herein. Accordingly, references should substantively align to ITSM/ITIL platform implementation and operations (including integration, process alignment, migration, testing, training, and support) rather than broad, unrelated IT services. Proposers should select references that most directly demonstrate success delivering the ITSM capabilities and governance described in Section 3.

RFP Section 5.2.2 — Evaluation Criteria

In accordance with CalHFA’s objective of selecting the most qualified consultant at a fair and reasonable cost, a Selection Committee, composed of appropriate staff representatives and/or qualified outside representatives, will review the proposals received and select the most qualified firms for interviews. The Selection Committee shall rank the vendors based upon the following criteria:

- Ability to perform the specific tasks outlined in the RFP.
- Qualifications of specific individuals who will work on the project.
- Amount of time and involvement of key personnel who will be involved in respective portions of the project.
- Reasonableness of the fee requested to do the work.
- Demonstrated record of success on work previously performed.
- Specific method and techniques to be employed on the project.
- Technical compliance with ITSM functional, performance, security, and integration requirements outlined in the Scope of Work.
- Short-listed vendors may be invited to provide a structured platform demonstration, using predefined functional scenarios to ensure consistent and comparable evaluations across all vendors. Detailed demonstration scripts will be provided approximately two weeks prior to each scheduled demo. Vendors may also be asked to participate in interviews, present implementation approaches, or provide a POC if requested by CalHFA.
- Any other criteria prescribed in this RFP for the required services including any presentations, interviews, changes in Scope of Services requirements, if so, required by CalHFA.
- Certified SB and DVBE participation may be taken into consideration as part of CalHFA’s overall assessment.

CONSOLIDATED QUESTION GROUP — Section 5.2.2

VENDORS & VARIATIONS:

Question: Sections 5.2.2 and 5.2.3, Evaluation Criteria / Fee Price Evaluation: Can CalHFA provide the relative weighting or importance of the technical solution, personnel/experience, implementation approach, demonstration/POC, and price?

Question: Sec. 5.2.2: Can CalHFA clarify the relative weight given to certified SB/DVBE participation within the overall evaluation scoring referenced in this section?

CONSOLIDATED RESPONSE

CalHFA does not disclose evaluation weighting, scoring details, or internal assessment methods. Proposals will be reviewed and ranked strictly in accordance with the evaluation criteria published in Sections 5.2.2 and 5.2.3 of the RFP. No additional weighting or scoring information will be released.

CalHFA does not disclose evaluation scoring methods, weighting, or internal assessment details. As stated in Section 5.2.2, certified SB/DVBE participation may be taken into consideration as part of the overall assessment, but no additional weighting or scoring information will be released.

RFP Section 5.3 — Award

After conclusion of the above Evaluations, a Notification of Intent to Award may be sent to any Vendor selected. CalHFA may make multiple awards.

Award is contingent upon successful negotiation of final contract terms and the approval of CalHFA. If contract negotiations cannot be concluded successfully, CalHFA may negotiate a contract with the next best qualified Vendor or withdraw the RFP. If CalHFA does not approve the recommendation to award, the RFP may be cancelled without any cost or obligation of CalHFA.

CONSOLIDATED QUESTION GROUP — Section 5.3

VENDORS & VARIATIONS:

Question: Page 14 – Section 5.3, Award: Following the award decision, what level of proposal evaluation feedback or debriefing will CalHFA make available to unsuccessful bidders?

CONSOLIDATED RESPONSE

CalHFA may provide unsuccessful bidders with brief, high-level written feedback upon written request, limited to general areas where the proposal did not align with the published requirements and evaluation criteria in the RFP.

RFP Section 19

RFP EXCERPT (verbatim):

CONSOLIDATED QUESTION GROUP — Section 19

VENDORS & VARIATIONS:

Question: Exhibit D, Sec. 19: Does Section 19's "work made for hire" ownership provision apply to custom configurations, integrations, and deliverables created specifically for CalHFA under this engagement, or is it intended to also apply to the underlying commercial off-the-shelf/SaaS platform that CalHFA would license and use under its own subscription terms?"

CONSOLIDATED RESPONSE

It is **not** intended to apply to the underlying commercial off-the-shelf (COTS) or SaaS platform, its proprietary code base, or any pre-existing intellectual property owned by the vendor. Ownership of the platform, its core software, and any pre-existing tools remain with the vendor under its standard licensing terms.

APPENDIX A — General Questions

Question: Is there a preference for local vendors?

RESPONSE

No, CalHFA does not have any such preference.

Question: What is the annual budget allocated for this RFP?

RESPONSE

CalHFA does not disclose internal budget allocations for competitive procurements. Any budgetary details remain confidential and are not released as part of the RFP Q&A.

Question: Work will be onsite or remote?

RESPONSE

Remote.

Question: Can vendor provide entire services from offshore location (outside US geography)"

RESPONSE

CalHFA does not allow services to be performed from offshore locations. All work must be delivered from within the United States in alignment with the Agency's security, operational, and data-residency requirements.

Question: Who are previous incumbents on this project?"

RESPONSE

No incumbents.

Question: What is the total budget for this contract?"

RESPONSE

CalHFA does not disclose internal budget allocations for competitive procurements. Any budgetary details remain confidential and are not released as part of the RFP Q&A.

Question: Is this a single-vendor or multi-vendor award?"

RESPONSE

The RFP does not predetermine the award structure, and CalHFA may issue one or more awards depending on what best meets the Agency's needs.

Question: Training: Training Audience — Please provide estimated numbers of IT administrators, service desk analysts, IT fulfillers, managers, approvers, general end users, and Administrative/Marketing users.

RESPONSE

CalHFA's RFP provides approximate staffing numbers in the background section for planning purposes. Vendors should use these figures as a baseline for estimating training audiences by role. CalHFA does not publish further breakdowns for managers, approvers, or general end users; training proposals should be flexible and scalable to accommodate the final deployment plan and user-role mapping determined during implementation.

Question: Please confirm the required FedRAMP authorization level and whether it must be in place at proposal submission or may be supported by an authorization roadmap. Also, must CalHFA data remain within the continental United States, with a data-residency attestation provided?

RESPONSE

CalHFA does not require the proposed solution to hold an active FedRAMP authorization at the time of proposal submission. While a FedRAMP-authorized environment is preferred where available, CalHFA will also consider platforms supported by equivalent, independently-validated security and compliance frameworks (e.g., SOC 2 Type II, ISO

27001, NIST-aligned controls) that provide comparable protections.

Regardless of the security framework used, all CalHFA data must remain within the continental United States, and vendors must provide a formal data-residency attestation confirming compliance.

Question: Please confirm whether CalHFA uses Microsoft 365 Commercial, GCC, GCC High, or a hybrid environment. Which Microsoft 365 services must be integrated?

RESPONSE

CalHFA is a Microsoft 365 GCC environment.

Question: Please provide details of the RingCentral environment, including edition, modules, APIs, and test-environment availability. Are screen pop, call logging, IVR routing, and presence synchronization all required at initial go-live?

RESPONSE

CalHFA requires integration with its existing RingCentral telephony environment as outlined in Section 3.2.1 of the RFP. However, CalHFA does not publish detailed specifications regarding the RingCentral edition, modules, APIs, or test-environment availability as part of the competitive solicitation process. Though they are readily available on the RingCentral website.

For planning purposes, vendors should assume that standard RingCentral CTI capabilities—such as screen pop, call logging, IVR routing, and presence synchronization—must be supported at initial go-live. The specific implementation scope and any environment-specific details will be confirmed with the selected vendor during discovery.

Question: Please provide an inventory of all CalHFA enterprise systems requiring integration, including system owners, APIs, authentication methods, data volumes, and preferred integration patterns.

RESPONSE

CalHFA does not publish a comprehensive inventory of internal enterprise systems (owners, APIs, auth methods, data volumes) as part of this competitive solicitation. The RFP identifies integration targets and baselines vendors must support, including Microsoft 365 (GCC), Active Directory/Entra ID, RingCentral, and discovery/security data sources; detailed environment specifics will be confirmed with the selected vendor during the Discovery Workbook deliverable.

- Primary targets at minimum: Microsoft 365 (GCC), Entra ID/Active Directory, RingCentral CTI/telephony, and CalHFA enterprise systems enumerated during discovery.
- API & auth baselines: Support REST/SOAP for core functions, OAuth 2.0 for secure authorization, and SCIM for user lifecycle provisioning.
- CMDB/discovery sources: Integrations must be able to consume data from Active Directory, Intune, network and cloud discovery systems, and security tooling, with workstation inventories remaining in authoritative external systems.
- Integration packaging: Include integration packages for Microsoft 365 (GCC), RingCentral, and CalHFA systems as part of deliverables; finalize details through the Discovery and licensing/use-case discovery.

Question: Please provide current ticket volumes, historical-retention requirements, attachment volumes, knowledge articles, users, groups, workflows, reports, and data-export formats.

RESPONSE

Vendors should base their proposals on the baseline staffing ranges and requirements provided in the RFP and document any assumptions used to estimate ticket volumes, data quantities, or reporting needs. CalHFA will review and validate these assumptions with the selected vendor during discovery, where current-state information—such as available workflows, groups, knowledge content, and legacy system details—will be gathered and refined. Final volumes, retention expectations, and export requirements will be defined collaboratively during project planning.

Question: Please identify the authoritative data sources for applications, infrastructure, SaaS platforms, business services, endpoints, Intune, network discovery, cloud discovery, and security tooling.

RESPONSE

CalHFA does not publish a full inventory of enterprise systems or authoritative data sources as part of this competitive solicitation. Vendors should use the integration baselines defined in Section 3 (Microsoft 365 GCC, Entra ID/AD, RingCentral, Intune, network/cloud discovery, and security tooling) and propose integration and CMDB/discovery assumptions accordingly.

Final authoritative data sources will be confirmed with the selected vendor during discovery and through the Discovery Workbook deliverable.

Question: Please confirm the expected number of agents, administrators, approvers, requesters, occasional users, and external users.

RESPONSE

CalHFA does not publish detailed persona-level user counts as part of the competitive solicitation. The RFP provides the available staffing baselines: approximately 31 IT staff and 20 Administrative/Marketing users, with 225–240 total employees considered potential requesters/end-users. Vendors should develop licensing and user-persona assumptions based on these published figures and propose scalable models that can be refined during discovery.

Final role segmentation (agents, administrators, approvers, requesters, occasional users, and external users) will be confirmed with the selected vendor as part of the discovery and user-mapping process.

Question: Please define support hours, severity levels, response and resolution targets, escalation procedures, named-support expectations, and quarterly roadmap-review requirements.

RESPONSE

CalHFA does not prescribe support hours, severity structures, response/resolution targets, escalation procedures, or named-support expectations as part of this solicitation. Vendors should propose a complete support model aligned to their best practices and the capabilities of their ITSM platform.

Proposals should include recommended operating hours, severity matrices, vendor specific SLA/OLA targets, escalation paths, and any roadmap-review cadence appropriate for CalHFA's size and requirements. These elements will be refined during planning with the selected vendor.

Question: Does CalHFA permit the use of offshore Cprime resources for implementation and/or ongoing support?

RESPONSE

CalHFA does not prohibit vendors from using offshore resources; however, any proposed delivery model must fully comply with all RFP requirements related to security, data residency, access controls, confidentiality, and handling of CalHFA information. Personnel performing implementation or support may not access, transmit, or store CalHFA data outside the continental United States, and all work must conform to the restrictions outlined in Section 3.3 and related security requirements.

Vendors may propose an offshore delivery component if it meets all mandatory security, residency, and compliance obligations. The final approval of resource locations and roles will occur during contract negotiations and is subject to CalHFA's security evaluation.

Question: Please confirm whether historical data, including closed tickets, comments, attachments, audit history, and related records, must be migrated into the new ITSM platform. If yes, please provide the required date range, data volumes, retention requirements, search/access expectations, and migration acceptance criteria.

RESPONSE

Vendors should propose a right-sized migration approach aligned to the RFP. CalHFA will confirm the specific historical data categories—such as closed tickets, comments, attachments, audit history, and related records—and any corresponding retention or access expectations during discovery and project planning. Final migration scope, date ranges, data volumes, and acceptance criteria will be defined collaboratively with the selected vendor and documented in the Discovery Workbook and migration runbooks.

Question: Does CalHFA currently use a separate knowledge-management platform or repository for service and support articles? If yes, please provide the platform, article volume and formats, content ownership, integration options, and whether the articles must be migrated, synchronized, or recreated in the proposed ITSM solution.

RESPONSE

Vendors should assume that any existing knowledge content will need to be reviewed, organized, and matured as part of the implementation. CalHFA will provide whatever knowledge materials are available during discovery, but vendors should plan for creating or refining the knowledge base within the new ITSM platform. The need for migration, synchronization, or recreation of content will be defined collaboratively during discovery and project planning.

APPENDIX B — Issue Mapping Questions

Question: SYSUSA: "Reference Exhibit A: Exhibit A Separate Word Document — The RFP states that Exhibit A has been provided as a separate Word document for bidders' use and instructs vendors to provide responses under each numbered point. However, the solicitation documents available to us do not include the referenced separate Word document. Please provide the separate Exhibit A Word document or confirm where vendors can obtain it."

RESPONSE

Please be advised that the updated RFP addresses this question in Exhibit A, there is no Word document.

Question: Exhibit A: Numbering — If vendors recreate Exhibit A, must the original question numbering be preserved exactly, including subparagraphs and lettered subsections?

RESPONSE

Yes, must follow the exact formatting.

Question: Exhibit A, Section II.H directs bidders to list sub vendors using the "CalHFA Sub vendors List," but this template is not posted with the RFP. Can CalHFA provide the Sub vendors List template, or confirm that bidders without sub vendors may state "Not Applicable" and that bidders with sub vendors may instead list the required information directly within Exhibit A?"

RESPONSE

Provide a list of sub-vendors if applicable, else respond with Not Applicable.

Question: Separate Submission Files — Please clarify whether CalHFA requires separate files for: technical proposal, pricing, exhibits/forms, references, certifications, and supporting documentation."

RESPONSE

Please submit your proposal as one document, do submit separate documents/files.

Question: Cover Letter and Executive Summary — Please confirm whether vendors are required to include both a Cover Letter and an Executive Summary.

RESPONSE

It is at your discretion whether you include a cover letter or executive summary.

Question: Proposal and Exhibit Submission Format — Please clarify whether the complete proposal, including all required exhibits, forms, certifications, and supporting documents, must be submitted as one consolidated PDF, or whether CalHFA requires separate files/attachments for individual exhibits and forms.

RESPONSE

You must submit your proposal as one consolidated PDF.

Question: Scope & Roadmap: Implementation Duration — Does CalHFA have a maximum or target implementation duration, or may vendors propose their recommended implementation schedule?

RESPONSE

The RFP does not specify a maximum or target implementation duration. Vendors should propose an implementation schedule aligned with their methodology and the RFP requirements. CalHFA will review proposed timelines and finalize the implementation schedule with the selected vendor during discovery and project planning.

Question: Scope & Roadmap: Phased Deployment — The RFP permits phased, pilot, or full deployment. Does CalHFA have a preferred deployment approach, or should vendors recommend the approach based on project risk and complexity?

RESPONSE

The RFP does not prescribe a preferred deployment method. Vendors should recommend a deployment approach—phased, pilot, or full—that aligns with their implementation methodology, the RFP requirements, and project-risk considerations. CalHFA will confirm the final deployment approach with the selected vendor during discovery and project planning.

Question: Scope & Roadmap: Current-State Documentation — Will CalHFA provide current-state process documentation, workflow diagrams, service catalog information, SLA definitions, CMDB information, and existing system documentation during implementation?

RESPONSE

CalHFA will share any available current-state information during discovery; however, vendors should assume that portions of the documentation—such as process workflows, service catalog structures, SLAs/OLAs, CMDB models, and legacy system details—may need to be developed or significantly refined as part of the implementation. The selected vendor’s discovery approach should accommodate creating or maturing these materials to support a modern ITSM practice. Final documentation needs will be defined collaboratively during discovery and project planning.

Question: Scope & Roadmap: Process Maturity — What is CalHFA's current ITIL process maturity for Incident, Request, Problem, Change, Release, Asset, CMDB, Knowledge, and Service Catalog management?

RESPONSE

RFP identifies the need to modernize and standardize CalHFA’s IT service delivery and to align processes to ITIL v4 best practices. Vendors should assume foundational maturity levels at the outset and propose an approach that establishes, refines, and matures these ITIL process areas through discovery, configuration, and guided process improvement. The specific maturity baselines and target states will be confirmed collaboratively during discovery and documented in the project plan and required deliverables.

Question: Scope & Roadmap: ITIL Scope — Is CalHFA expecting the selected vendor to formally redesign existing processes to ITIL v4 standards, or primarily configure the platform around existing processes with recommended improvements?

RESPONSE

CalHFA expects the selected vendor to assist in establishing and maturing ITSM processes aligned to ITIL v4 best practices. While CalHFA has existing workflows that support current operations, the implementation will involve refining and enhancing these processes to support a modern ITSM practice. The specific level of redesign versus configuration will be determined collaboratively during discovery and project planning to ensure the solution meets CalHFA's operational needs and long-term roadmap.

Question: Scope & Roadmap: Process Governance — Who will have final authority at CalHFA to approve proposed changes to business processes and workflows?

RESPONSE

CalHFA will confirm governance roles during project planning with the selected vendor. Vendors should propose a process-governance approach that identifies key decision points and stakeholder involvement. Final approval authority for process and workflow changes will be assigned as part of the agreed-upon project governance structure during discovery.

Question: Migration: Existing System — Please identify the current home-grown incident and request tracking system, including its technology/platform, database technology, hosting model, and major integrations.

RESPONSE

The RFP identifies CalHFA's existing system as a home-grown incident and requests tracking solution that no longer meets operational needs. Detailed information about its underlying technology, database, hosting model, and integrations will be reviewed with the selected vendor during discovery and project planning. Vendors should propose a migration and integration approach aligned to the RFP requirements, and CalHFA will validate the final legacy-system details during implementation.

Question: Migration: Historical Data — Please provide the approximate number of historical incident, request, problem, change, and other records that CalHFA expects to migrate.

RESPONSE

CalHFA will confirm historical data volumes with the selected vendor during discovery and project planning. Vendors should propose a right-sized migration approach aligned to the RFP and document their own assumptions regarding historical record counts in their proposals. Final migration volumes will be defined in collaboration with CalHFA and captured in the Discovery Workbook and migration runbooks.

Question: Migration: Migration Scope — Which historical data categories are required to be migrated, and how many years of historical data are expected to be retained in the new platform?

RESPONSE

Vendors should propose a right-sized migration approach aligned to the RFP. CalHFA will confirm the specific historical data categories—such as incidents, requests, problems, changes, knowledge, catalog items, attachments, comments/work notes, and configuration data—and the corresponding retention requirements during discovery and project planning. Final migration scope and the number of years of historical data to retain will be defined with the selected vendor and documented in the Discovery Workbook and migration runbooks.

Question: Licensing: Concurrent Users — Please provide the estimated number of concurrent users for the ITSM platform.

RESPONSE

Vendors should base concurrency assumptions on the baseline staffing ranges provided in the RFP and document any assumptions used when developing licensing and TCO models. Detailed concurrency estimates will be validated with the selected vendor during discovery and project planning.

Question: Licensing: Ticket Volumes — Please provide historical average monthly and annual volumes for incidents, service requests, problems, changes, knowledge searches, major incidents, catalog requests, and other cases/workflows.

RESPONSE

Vendors should base their proposals on the staffing ranges and requirements provided in the RFP and document any assumptions used to estimate ticket or case volumes. CalHFA will review and validate these assumptions with the selected vendor during discovery and project planning.

Question: Licensing: Peak Volumes — Please provide expected peak ticket/request volumes and any known seasonal variations."

RESPONSE

Vendors should base their proposals on the staffing ranges and ITSM requirements provided in the RFP and document any assumptions used for estimating peak or seasonal ticket volumes. CalHFA will review and validate those assumptions with the selected vendor during discovery and project planning.

Question: Licensing: AI Consumption — Please provide historical or estimated AI usage volumes, including expected virtual-agent interactions, AI classifications, summarizations, recommendations, RAG searches, and other AI use cases.

RESPONSE

Vendors should prepare AI-related pricing and consumption assumptions in accordance with Section 4.2.3, providing SKU-level pricing, consumption pricing, and a three-year TCO. The RFP does not define specific AI usage volumes; vendors should document their own assumptions for virtual-agent interactions, AI classifications, summarizations, recommendations, RAG searches, and other AI use cases, and CalHFA will validate these assumptions during discovery and project planning.

Question: Licensing Model — Does CalHFA expect vendors to provide separate pricing for each user/license type, including fulfiller, requester, admin, approver, platform/application users, and AI users where applicable?

RESPONSE

Vendors should structure licensing in accordance with Section 4.2.3, providing SKU-level pricing and clearly documenting all licensing assumptions. Proposals should include separate pricing for the relevant user/license types supported by the vendor's model—such as fulfillers/agents, administrators, approvers/managers, requesters/portal users, platform/application users, and AI-related licensing—so that these costs can be reflected in the three-year TCO. Final role segmentation will be confirmed during discovery and project planning.

Question: Reference Pricing/TCO: Pricing Template — Will CalHFA provide a pricing template or schedule for vendors to complete?

RESPONSE

CalHFA will not provide a pricing template. Vendors should structure pricing in accordance with Section 4.2.3, including SKU-level pricing, consumption pricing, non-production environments, uplift caps, and a three-year TCO, and clearly document all pricing assumptions within their proposals.

Question: Pricing/TCO: Three-Year Pricing — Should the three-year TCO include subscription/license costs, implementation services, integrations, AI consumption, support, enhancements, and all optional/add-on modules?

RESPONSE

Vendors should structure pricing in accordance with Section 4.2.3, which requires SKU-level pricing, consumption pricing, non-production environments, uplift caps, and a comprehensive three-year TCO. The three-year TCO should include all costs associated with the proposed solution, including subscription/license expenses, implementation services, integrations, AI/consumption-based items, support, enhancements, and any optional or add-on modules the vendor includes in its proposal. All underlying pricing assumptions should be clearly documented.

Question: Pricing/TCO: Renewal Pricing — Please clarify whether vendors should provide fixed pricing for Years 1–3 or may apply annual increases.

RESPONSE

Vendors should structure pricing in accordance with Section 4.2.3, providing SKU-level pricing, consumption pricing, uplift caps, and a three-year TCO. Vendors may propose either fixed pricing or clearly documented annual increases, if all assumptions are transparent and reflected in the three-year TCO. Final pricing terms will be reviewed during evaluation and confirmed during contract negotiation.

Question: Pricing/TCO: Uplift Cap — Does CalHFA have a preferred maximum annual price escalation/uplift percentage?

RESPONSE

Vendors should prepare pricing in accordance with Section 4.2.3 of the RFP, providing SKU-level pricing, consumption pricing, uplift caps, non-production environments, and a three-year TCO. Vendors may document their own consumption assumptions as part of their pricing model, and CalHFA will validate those assumptions during discovery and project planning.

Question: Pricing/TCO: Consumption Pricing — For consumption-based services, should vendors provide estimated annual consumption based on CalHFA's current user/ticket volumes or provide unit pricing only?

RESPONSE

CalHFA will not provide a pricing template. Vendors should structure pricing in accordance with Section 4.2.3, including SKU-level pricing, consumption pricing, non-production environments, uplift caps, and a three-year TCO, and clearly document all pricing assumptions within their proposals.

Question: Reference Incident Mgmt: Incident Categories — Please provide CalHFA's current incident categorization, priority, assignment group, and escalation structures.

RESPONSE

Incidents use a basic categorization of Low-Medium-High with basic escalation processes varied by team. CalHFA is open to vendor suggestions to further align our categories with best practices/industry standards.

Question: SLA/OLA: Existing SLA Definitions — Please provide CalHFA's current SLA definitions, including response, resolution, fulfillment, and escalation targets.

RESPONSE

Vendors should propose SLA, OLA, XLA, and escalation structures aligned to ITIL practices and the functional requirements in the RFP. CalHFA will review and finalize SLA definitions—including response, resolution, fulfillment, and escalation targets—during discovery and project planning with the selected vendor.

Question: SLA/OLA: OLA Requirements — Please provide the expected OLA structures and relationships between internal support teams.

RESPONSE

CalHFA will finalize OLA structures and team-to-team support relationships during discovery and project planning. Vendors should propose an OLA framework aligned to ITIL practices and the RFP's workflow requirements, and CalHFA will refine OLA details—such as routing, escalations, and handoffs—with the selected vendor as part of the implementation.

Question: Change Mgmt: Change Models — Please provide the anticipated number and types of standard change models required during implementation.

RESPONSE

Vendors should propose a right-sized set of initial standard change models aligned to ITIL v4 and the capabilities described in the RFP. CalHFA will finalize the number and types of change models during discovery and project planning.

Question: Discovery: Discovery Tools — Please identify the network discovery, cloud discovery, security, endpoint, and monitoring tools that must integrate with the CMDB.

RESPONSE

CalHFA will finalize the specific discovery tools and endpoints during discovery. Per the RFP, CMDB integrations are expected to cover categories such as Intune, network discovery, cloud discovery, and security tooling, with workstation inventories remaining in authoritative external systems; vendors must disclose pricing for any endpoint-based discovery modules and provide a complete connector catalog (APIs, OAuth 2.0, SCIM, GCC limitations) for inclusion in the three-year TCO. Security and U.S. data-residency requirements apply, and the final integration inventory will be documented in the Discovery Workbook and CMDB runbooks (Section 3.8).

Question: Integration: Enterprise Applications — Please provide a complete list of CalHFA enterprise applications requiring integration with the ITSM platform.

RESPONSE

The RFP identifies integration with Microsoft 365 (Hybrid/GCC), Active Directory/Entra ID, and RingCentral (including validated CTI), and anticipates categories such as HR/Facilities case systems and monitoring tools for event-driven incident creation. Vendors must support REST/SOAP APIs, OAuth 2.0, and SCIM, and provide a complete connector catalog with GCC limitations and pricing disclosures for inclusion in the three-year TCO. The full list of enterprise applications will be finalized during discovery and project planning.

Question: Integration: Integration Priority — Which integrations are mandatory for Year 1 versus Years 2–3?

RESPONSE

Specific integrations within the CalHFA environment and their priority will be shared for discussion with the selected vendor during the discovery phase.

Question: Data Residency: Continental U.S. — The RFP requires data residency within the continental United States. Does this requirement apply to primary production data, backup data, disaster recovery data, logs, metadata, analytics, AI processing, AI model infrastructure, and subprocessor systems?

RESPONSE

CalHFA's data-residency requirement applies to the overall solution and its supporting services. Vendors should assume U.S. residency for production and non-production data, backups/DR artifacts, operational logs/telemetry/metadata, and reporting/analytics outputs, and provide an official data-residency attestation (see Section 3.2.5). AI features must comply with the RFP's AI governance (e.g., no training/fine-tuning on CalHFA data; disclosure of AI sub-processors; auditability), and vendors must disclose all sub-processors with advance notice of changes (see Section 3.3.4). Final scoping of any exceptions or special handling will be confirmed during discovery and project planning.

Question: Data Residency: Data Residency Attestation — What form of official data-residency attestation will CalHFA accept?

RESPONSE

The RFP requires vendors to ensure U.S. data residency and to provide an official attestation confirming that requirement (Section 3.2.5). The RFP does not prescribe a specific attestation format. Vendors should propose an attestation consistent with their platform's standard compliance documentation (e.g., formal statements from the provider or equivalent independently-validated security/compliance materials). CalHFA will review the proposed attestation as part of the security evaluation and confirm final requirements during discovery and contract review.

Question: Data Residency: RTO/RPO — Please provide CalHFA's required RTO and RPO targets.

RESPONSE

The RFP requires vendors to document their Recovery Time Objective (RTO) and Recovery Point Objective (RPO) targets and provide supporting disaster-recovery and failover information as part of their proposed solution (Section 3.3.3). The RFP does not prescribe specific numeric RTO or RPO values. Vendors should propose appropriate targets based on their platform's capabilities, along with the related DR processes and testing approach, and CalHFA will finalize expectations during discovery and project planning.

Question: Data Residency: DR Testing — Please clarify the required frequency and scope of disaster-recovery testing.

RESPONSE

The RFP requires vendors to meet CalHFA's disaster-recovery, backup, failover, and incident-response requirements outlined in Section 3.3.2, including documented DR workflows, rollback options, version backups, and DR testing. The RFP does not prescribe specific DR testing frequencies or scope. Vendors should propose DR testing practices appropriate for their solution and include the related documentation, controls, and schedules as part of their implementation approach. Final DR testing expectations will be established with the selected vendor during discovery and project planning.

Question: Security: Security Framework — The RFP requires SOC 2 Type II, ISO 27001, and NIST alignment. Please clarify whether these certifications must be held by the ITSM platform vendor, implementation vendor, or both.

RESPONSE

CalHFA does not require these certifications to be held by both the ITSM platform vendor and the implementation vendor; however, demonstrated alignment with SOC 2 Type II, ISO 27001, and NIST-based controls is preferred and may strengthen the overall security posture of the proposed solution. Vendors may highlight any relevant certifications or independently-validated security frameworks associated with their platform or implementation team. CalHFA will review the proposed security posture as part of the evaluation process and through the Information Security Questionnaires included in the RFP.

Question: Security: FIPS 140-2 — Please confirm whether FIPS 140-2 validation is required for all cryptographic modules used by the solution and its integrations, including third-party services.

RESPONSE

Yes, FIPS 140-2 validation is required.

Question: Performance: UI Response Time — Please provide the required maximum response time for standard user-interface transactions.

RESPONSE

The RFP requires vendors to meet the performance benchmarks and telemetry requirements described in Section 3.4, including monitoring and reporting of UI response times and acceptable latency thresholds. The RFP does not prescribe specific numeric values. Vendors should propose appropriate UI performance targets and monitoring capabilities based on their solution architecture, and CalHFA will finalize performance thresholds during discovery and project planning.

Question: Performance: API Response Time — Please provide the required maximum API response time for standard transactions.

RESPONSE

The RFP requires vendors to meet performance benchmarks and provide telemetry for monitoring, including UI and API response times and maximum acceptable latency thresholds (Section 3.4) and to adhere to the Network and Performance Standards in Section 3.2.4. The RFP does not prescribe a specific numeric maximum for API response times. Vendors should propose right-sized benchmarks, instrumentation, and alerting aligned to their solution architecture, and CalHFA will finalize thresholds during discovery and project planning.

Question: PM: CalHFA Project Team — Please identify the expected CalHFA project team roles and estimated availability during implementation.

RESPONSE

CalHFA will finalize project-team roles and availability during project planning with the selected vendor. Vendors should propose an implementation approach that identifies key CalHFA touchpoints—such as project management, ITSM process owners, technical SMEs, security, and end-user representatives—and CalHFA will align internal participation to the agreed-upon milestones and discovery activities.

Question: PM: SME Availability — How much time will CalHFA subject-matter experts be available for discovery, design, testing, training, and approvals?

RESPONSE

CalHFA will coordinate SME participation as part of the project plan developed with the selected vendor. Vendors should propose a discovery and implementation approach that identifies SME touchpoints and required involvement, and CalHFA will align SME availability to those agreed-upon milestones during project planning.

Question: Testing: UAT Responsibility — Will CalHFA provide UAT resources, or should the vendor provide UAT testers?

RESPONSE

Vendors should assume responsibility for developing the test scenarios and test cases required for implementation. CalHFA will review vendor-developed plans and support UAT. Separately, short-listed vendors may be asked to complete a scripted platform demonstration using functional scenarios provided by CalHFA for evaluation purposes.

Question: Testing: Test Cases — Will CalHFA provide existing test cases, or is the vendor responsible for developing all test scenarios?

RESPONSE

Yes, CalHFA will provide existing test cases to be requested in any demos provided by prospective vendors.

Question: Exhibit D: Does the Agency Service Agreement include a limitation-of-liability provision applicable to this engagement? If none is included in the template provided, will CalHFA consider adding one during contract negotiation?"

RESPONSE

The Agency's Standard Service Agreement (Exhibit D) governs this procurement, and the terms and conditions within are generally non-negotiable. Vendors may identify any requested changes or objections in a separate "Exceptions to Service Agreement" document, as described in Section 4.2.6 of the RFP. CalHFA will review submitted exceptions as part of the proposal evaluation process but is not committing to modify or add a limitation-of-liability provision beyond what appears in the standard agreement.

Question: Scope of Work Users & Licensing - How many users will require full ITSM agent/fulfiller capabilities? How many users will work primarily as Service Desk agents?

How many IT Operations/Infrastructure users require agent access?

How many Security/Network/other technical users require agent access?

How many managers/approvers require access?

How many users will access the self-service portal?

Will external users/contractors require access?

Of the approximately 20 Administrative and Marketing personnel identified in the RFP, how many require requester/portal-only access versus fulfiller/agent or manager/approver access?

RESPONSE

The RFP provides CalHFA's staffing ranges—approximately 31 IT personnel, around 20 Administrative/Marketing personnel with specialized role-based access, and 225–240 total employees—which vendors may use as planning assumptions. Final user segmentation (e.g., ITSM fulfillers, service desk agents, operations/infrastructure users, security/network users, managers/approvers, portal-only requesters, and any external/contractor roles) will be confirmed with the selected vendor during discovery and project planning.

Vendors should propose a right-sized licensing approach aligned to the RFP's requirements, including ITIL-aligned workflows, RBAC segmentation, and support for self-service portal users, and clearly document any licensing assumptions used in calculating three-year TCO pricing. Role counts and persona distributions will be validated and finalized during implementation planning.

Question: Proposal Content and Format: Please confirm whether any page limit, font requirement, file-size limit, or required section order applies beyond the embedded templates and exhibits.

RESPONSE

The RFP does not impose a page limit, font requirement, or specific file-size restriction. Vendors must ensure CalHFA can successfully receive the proposal submission by email. Proposals must follow the content structure, templates, and exhibits outlined in Section 4.2 of the RFP, and all required components must be submitted in the order specified. Vendors should use the provided exhibits and response templates where applicable to ensure consistency and completeness.

Question: Scope / Start of Service: Please clarify the expected implementation/go-live timeline after the January 4, 2027 start of service and any mandatory Year 1 milestones.

RESPONSE

CalHFA will establish the production go-live date and Year-1 milestones during project planning and discovery. The RFP requires vendors to be capable of providing services by Monday, January 11, 2027 as Start of Service; vendors should propose a Year-1 plan covering discovery, configuration/integrations, data migration/validation, testing/UAT, training/knowledge transfer, deployment with hypercare, and stabilization, per Sections 3.6–3.8.

Question: Security and Compliance: Please specify the required FedRAMP authorization level and whether the production environment must hold that authorization at proposal submission.

RESPONSE

CalHFA does not require the proposed solution to hold an active FedRAMP authorization at the time of proposal submission. While a FedRAMP-authorized environment is preferred where available, CalHFA will also consider platforms supported by equivalent, independently-validated security and compliance frameworks (e.g., SOC 2 Type II, ISO 27001, NIST-aligned controls) that provide comparable protections.

Regardless of the security framework used, all CalHFA data must remain within the continental United States, and vendors must provide a formal data-residency attestation confirming compliance.

Question: Technical Requirements – Microsoft GCC: Please identify known Microsoft 365/Entra ID Hybrid-GCC constraints, required Graph endpoints, and tenant-specific integration assumptions vendors should price.

RESPONSE

Vendors should propose and price Microsoft 365/Entra ID Hybrid-GCC integrations per

the RFP, listing supported Microsoft Graph endpoints, Teams integration capabilities, and any GCC-specific limitations for their solution (Section 3.2.1). The RFP does not name tenant-specific constraints or required endpoints; vendors must document their own assumptions—recognizing that commercial and government cloud licensing/features are not one-to-one—and reflect them in the three-year TCO (Section 4.2.3). Endpoint selection and configuration will be finalized during discovery; integrations must meet OAuth/SCIM, RBAC segmentation, U.S. data residency, and security requirements (Sections 3.2.2, 3.2.5, 3.3). Vendors with government-client experience should highlight it per Section 5.1.1.

Question: Pricing / Discovery: Please provide or confirm annual ticket volumes, environment counts, integration endpoints, AI usage assumptions, and endpoint-discovery quantities for comparable three-year TCO pricing.

RESPONSE

Vendors should prepare pricing and TCO based on the requirements, staffing ranges, and integration targets stated in the RFP. Proposals must include SKU-level pricing, consumption pricing, non-production environments, uplift caps, and a three-year TCO, as outlined in Section 4.2.3. Any additional operational quantities needed for pricing should be clearly documented as vendor assumptions, and final values will be confirmed with the selected vendor during discovery and project planning.

Question: CMDB: Can you list out all potential CMDB data sources and the nature including volumes of data expected to be imported into CMDB?

RESPONSE

CalHFA will finalize CMDB data sources and volumes during discovery. Per the RFP, the CMDB focuses on applications, infrastructure services, SaaS platforms, and business services; workstation inventories remain in authoritative external systems. Expected discovery integrations include Active Directory, Intune, network discovery tools, cloud discovery systems, and security tooling, with vendors required to disclose pricing for any endpoint-based discovery modules. Specific sources, CI taxonomy/relationships, and volumes will be documented with the selected vendor in the Discovery Workbook and CMDB runbooks.

Question: Telephony & Call Center: Does CALHFA intend to integrate ServiceNow with RingCentral Telephony application. If Yes, please describe call volumes.

RESPONSE

CalHFA requires the selected ITSM solution to support validated CTI integration with

RingCentral, including capabilities such as screen pop, call logging, IVR routing, and presence synchronization, consistent with the RFP's integration requirements. The RFP does not prescribe a specific ITSM product; vendors should propose a platform that meets these CTI capabilities and integrates with RingCentral and Microsoft 365 (Hybrid/GCC) as specified. Call-volume metrics will be confirmed during discovery and planning; CalHFA is not publishing call-volume figures in the Q&A.

Question: Does CalHFA currently operate an enterprise workflow, case management, or service management platform that the proposed ITSM solution is expected to extend, integrate with, or coexist with? If so, please identify the existing platform capabilities, production environments, and relevant integrations that bidders should consider in their proposed architecture.

RESPONSE

The RFP identifies CalHFA's current service-management environment as a home-grown incident and request tracking system that no longer meets operational needs. The solicitation seeks a modern, ITIL v4-based, FedRAMP-compliant ITSM platform that integrates with Microsoft 365 (Hybrid/GCC), Active Directory/Entra ID (Hybrid/GCC), and RingCentral, and supports the functional and technical requirements outlined in Section 3. The RFP does not direct vendors to extend or coexist with any separate enterprise workflow or case management platform; vendors should base proposals on the ITSM scope and integration targets specified in the RFP. Final coexistence and integration details, if any, will be confirmed during discovery and project planning.

Question: Please identify the authoritative system or systems of record for employee, contractor, and position data, for example a State of California HR or payroll system, Entra ID, or a departmental system. Please confirm whether integration to that system is in scope for the initial implementation, and in which direction data is expected to flow.

RESPONSE

The RFP does not identify or require integration with any statewide HR, payroll, or external personnel systems. Vendors should base proposals on the ITSM requirements described in the RFP, which focus on CalHFA's internal IT environment and role-based access needs. Any integration assumptions involving authoritative systems of record for personnel or position data will be defined during discovery and are not in scope for initial ITSM implementation unless explicitly documented in the RFP. CalHFA will confirm data-flow direction, if applicable, with the selected vendor during project planning.

Question: Please describe the environment to be discovered, including the number of physical sites and data centers, the number and type of cloud tenants or subscriptions such as Azure, AWS, GCP, and Intune, the approximate number of IP-addressable subnets, and any network segments such as DMZ or restricted zones that will be excluded from discovery or require special handling.

RESPONSE

CalHFA is not publishing detailed site counts, network inventories, tenant/subscription details, or subnet topology in the Q&A. Environment specifics will be confirmed with the selected vendor during discovery workshops and the Data Migration & Environment Setup phase, and documented in the project plan, Discovery Workbook, and architecture/security deliverables (see Sections 3.6.2, 3.6.4, and 3.8). Vendors should propose a right-sized discovery approach that aligns with the RFP's integration targets (e.g., Microsoft 365 Hybrid/GCC, RingCentral) and security requirements (RBAC segmentation, data residency, FedRAMP posture), and include transparent assumptions in pricing.

Question: Approximately how many service catalog items are expected for the initial implementation, and how many currently exist in the legacy environment? Approximately how many are expected to require automated provisioning or downstream system integrations?

RESPONSE

CalHFA currently does not have a service catalog, the current system allows users to submit open ended requests, the selected vendor is expected to provide consulting and guidance on implementing best practices which can include a service catalog.

Question: For the RAG-enabled knowledge requirement, which enterprise knowledge sources are expected to participate at go-live? Should the solution operate only against knowledge stored within the ITSM platform, or must it also access repositories such as SharePoint and Microsoft 365, or other CalHFA knowledge sources?

RESPONSE

At minimum, vendors should assume that RAG will operate over the ITSM platform's native knowledge base at go-live. CalHFA may evaluate extending RAG to additional repositories—such as content stored in Microsoft 365/SharePoint—based on supported connectors and security/compliance requirements. The final set of knowledge sources, indexing scope, and connector use will be confirmed during discovery. All proposed RAG capabilities must comply with CalHFA's AI governance, security, and data-residency requirements in the RFP.

Question: Please identify the RingCentral products and configuration currently in use and clarify the intended CTI use case. Is CTI required only for the IT service desk, or should the solution support additional business or case management contact center functions? Please provide approximate agent counts and call volumes if available.

RESPONSE

CalHFA utilizes RingCentral RingEX and RingCentral RingCX as part of its current communications environment. The ITSM solution must support validated CTI integration with RingCentral, including capabilities such as screen pop, call logging, IVR routing, and presence synchronization, as described in the RFP. The RFP does not require vendors to design CTI solely for the IT service desk; vendors may propose CTI integrations that support the service desk and, where appropriate, additional enterprise workflows that align with CalHFA's role-based access requirements.

CalHFA is not publishing internal agent counts, call volumes, or detailed configuration specifics. These elements will be reviewed with the selected vendor during discovery and planning. Vendors should base proposals on the functional CTI capabilities required in the RFP and may include scalable options to accommodate service-desk needs as well as potential broader business or case-management use cases.

Question: Please provide available information regarding the legacy home-grown incident and request system and the expected migration scope, including source technology, approximate record counts, history retention requirements, attachments, comments and work notes, knowledge, catalog and configuration data, and any known data quality challenges.

RESPONSE

The legacy system currently uses an SQL database. Additional details such as migration scope, record counts etc. will be uncovered during the discovery phase.

Question: Please clarify CalHFA's desired post-implementation operating model. Is the selected vendor expected to provide an ongoing managed platform service for administration, releases, support, and enhancement, or primarily a defined implementation and hyper care period followed by transition to CalHFA personnel? If ongoing support is expected, please identify the anticipated duration and level of vendor responsibility.

RESPONSE

CalHFA's RFP defines expectations for deployment/transition, training/knowledge transfer, and ongoing support and continuous improvement (see Sections 3.6.5, 3.6.6, and 3.7). The RFP does not prescribe a single post-implementation operating model. Vendors may propose a right-sized approach that could include (a) a defined implementation with hyper care followed by a transition to CalHFA personnel, and/or (b) an ongoing managed service. CalHFA will evaluate proposed models in accordance with the RFP's requirements and deliverables—e.g., named support resources, escalation paths, SLAs, release/update practices, and quarterly roadmap reviews—during proposal review and project planning. Vendors should clearly document assumptions, roles/responsibilities (RACI), SLAs/XLAs, staffing levels, pricing, and an orderly exit/transition plan for any managed service option.

Question: Please provide anticipated user counts by persona, including IT fulfillers and agents, platform administrators, developers and configurators, non-IT business fulfillers or case workers, approvers, end users and requesters, reporting-only users, and any other licensed personas expected to use the platform.

RESPONSE

CalHFA will finalize detailed user-persona counts during discovery and project planning. The RFP provides staffing ranges in Section 2.2, approximately 31 IT staff, roughly 20 Administrative/Marketing personnel with specialized role-based access, and 225–240 total employees, which vendors may use as preliminary assumptions. Final persona segmentation (e.g., fulfillers, administrators, approvers, case workers, requesters, reporting users, developers/configurators) will be established during the implementation and documented in the project plan and related deliverables.

Question: Was the RFP informed by vendor demonstrations or market research conducted prior to issuance? If so, will any resulting materials be made available to all bidders?

RESPONSE

CalHFA will not release any such materials. Bidders should rely solely on the published RFP and the forthcoming consolidated Q&A for all information relevant to proposal preparation.

Question: Sub-vendor information and scope: (Exhibit A, Section II.H, printed page IV (PDF page 20); Section 3, Scope of Work.) Please provide the CalHFA Sub-vendors List referenced in Exhibit A and identify any additional sub-vendor qualification or approval requirements.

CalHFA does not prohibit the prime contractor from organizing work into discrete packages or using approved subcontractors; however, any subcontract(s) require **prior written consent** per the Agency's Service Agreement, and all work remains subject to CalHFA's security, compliance, and deliverable requirements (e.g., testing, documentation, training, and discovery artifacts). Final arrangements will be confirmed during contract negotiations and project planning.